

UTAH

Counties in Review 2010



An Economic Update

by the Utah Department of Workforce Services

Workforce Research and Analysis Unit

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I. BEAR RIVER ECONOMIC SERVICE AREA: Box Elder, Cache, And Rich Counties

By John Mathews, Economist

A. CURRENT ECONOMY

BRIEF OVERVIEW

The three-county area economy struggled in 2010. As a whole, the area lost some 700 jobs in 2010, down one percent from 2009. Box Elder County continued to lose jobs in most of its employment sectors. It lost 1,230 jobs, or a drop of -6.7 percent from 2009. On the other hand, Cache County, which is about three times the size of Box Elder's economy, grew by 1.3 percent, adding 630 jobs. Cache industry sectors, including construction and manufacturing, felt a year over increase in jobs of 630. Rich County struggled last year losing about 10 percent of its nonfarm jobs, half of those were in construction. The service area, particularly Box Elder County, is still feeling the sting of the recession. Unemployment in the ESA averaged 6.6 percent in 2010 which was a full percentage point below the state average of 7.7 percent. Box Elder County's jobless rate, however, was 9.0 percent which was three percentage points above both Cache and Rich counties (5.7 percent). So far, into March of 2011, the unemployment rate for Box Elder was 8.9 percent, 5.3 percent for Cache and 5.9 percent for Rich County. The graph on job change below shows the most current month (December) year-over change. For unemployment, the annual averages are show in that graph.

Construction activity in Box Elder and Cache counties brightened the economic picture with both counties experiencing increases in building permits and in total valuation of construction. Building activity in Rich County was off significantly from 2009. Consumer spending increased in Box Elder County (6.8 percent) which is a positive sign, however Cache County's spending was down by about 5.0 percent for 2010. It appears that Box Elder County will continue to feel the pangs of the downturn where Cache County is already rebounding from the recession. One of the reasons for this dichotomy is the heavy reliance of Box Elder's economy on manufacturing industries and more pointedly the reliance on export based durable goods manufacturing – those products that are highly sensitive to the economic pressures on the national and international markets. On the other hand, half of Cache County's manufacturing is in nondurable goods – namely food products that bring stability in demand because they are necessities that are typically locally consumed and population driven.

Job Growth by Industry

Bear River ESA

	Dec 2009 to Dec 2010 Change in Nonfarm Jobs			
	Box Elder	Cache	Rich	Total ESA
Total Percent Change	-5.0%	2.0%	-7.6%	0.1%
Mining	5	0	1	6
Construction	-127	486	-20	339
Manufacturing	-706	110	1	-595
Wholesale Trade	48	-13	0	35
Retail Trade	-160	-47	-5	-212
Transportation & Warehousing	-14	39	3	28
Utilities	-1	2	0	1
Information	12	2	0	14
Financial Activities	-10	-94	-8	-112
Professional & Business Services	63	254	13	330
Private Education	20	-2	0	18
Healthcare and Social Services	29	161	-37	153
Leisure and Hospitality	-81	180	9	108
Other Services	-3	-48	-1	-52
Government	40	-26	0	14
Source: Utah Department of Workforce Services.				

BOX ELDER COUNTY

Year-over job losses in construction (-180) and manufacturing (-817) continue to hamper economic activity in the county. Both retail trade and transportation sectors have lost about 130 jobs each. Only business services and healthcare reported net increases in jobs between 2009 and 2010. December 2010 data show a year over loss of 960 jobs, or a decline of 5.4 percent, which is a slowing rate of loss. At the end of 2010 some industries showed net job gains. These include wholesale trade, business services, healthcare, and government. Unemployment in March of 2011 was about the same as it was a year ago – 8.9 percent. Spending in the fourth quarter of 2010 increased 6.8 percent. Construction activity was notably up from last year. Permits rose 69 percent and valuation jumped 93 percent. This is interesting considering the other negative economic reports.

CACHE COUNTY

Cache County's economy seemed to be somewhat insulated from the stresses affecting its sister county to the west. Jobs increased by 1.3 percent – 630 jobs - between 2009 and 2010. All the larger industries experienced year-over growth, even construction added jobs. Only trade, transportation, and utilities, finance, and business counts were off. By December 2010 the rate of job growth was up to 2.1 percent with the county adding 1,070 jobs. The unemployment rate for 2010 was 5.7 percent. That rate is now (March 2011) 5.3 percent. The economy is getting better. Spending is off but is somewhat improved compared to the recent past. Construction activity, both in terms of permitting and total valuation is increasing as the economy improves. Utah State University's stabilizing influence has helped the county's economy remain in good shape.

















































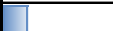


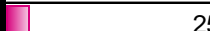








RICH COUNTY

Job growth in 2010 was down by about 70 workers out of 700, or 10 percent. Construction, trade and healthcare all lost jobs in 2010. By the end of 2010 job numbers were down but by only about half (40) from the year before. Unemployment in the county had held at the 5.8 percent level for both March of 2010 and March of 2011. Hopefully, when the weather changes and the recreation season begin the employment number for the county will improve.

Unemployment Rates				
Bear River ESA				
	Annual Unemployment Rates			
	2007	2008	2009	2010
STATE OF UTAH	2.8%	3.7%	7.1%	7.7%
Bear River ESA	2.4%	3.2%	6.0%	6.6%
Box Elder County	2.9%	4.2%	7.8%	9.0%
Cache County	2.2%	2.9%	5.3%	5.7%
Rich County	2.2%	2.8%	4.9%	5.7%
Source: Utah Department of Workforce Services				

RECENT HIRING ACTIVITY

Most hiring activity occurred in the industry sectors where most of the employment is. Interesting to note is that even in an economy in a recession (Box Elder) or one pulling out of a recession (Cache), there are thousands of new hiring transactions. Most of the new hiring occurred in construction, manufacturing, business services, healthcare, and accommodation and food services. Over 78 percent of the 10,600 new hires (third quarter 2010) were in Cache County (8,300) which was reflective of the job growth they are experiencing. Still, Box Elder new hires were 2,200.

New Hires by Industry*				
Bear River ESA				
	Third Quarter 2010 New Hires			
	Box Elder	Cache	Rich	Total ESA
Agriculture (covered)	 182	 25	 N/A	 207
Mining	 8	 -	 N/A	 8
Construction	 277	 1,527	 10	 1,814
Manufacturing	 323	 895	 N/A	 1,218
Wholesale Trade	 49	 81	 -	 130
Retail Trade	 342	 7	 13	 349
Transportation & Warehousing	 147	 787	 N/A	 787
Utilities	 N/A	 N/A	 0	 -
Information	 5	 99	 -	 104
Financial Activities	 25	 160	 23	 208
Professional & Business Services	 400	 2,176	 12	 2,588
Education, Healthcare, Social Svcs	 200	 1,252	 3	 1,455
Leisure and Hospitality	 305	 954	 57	 1,316
Other Services	 57	 174	 23	 254
Public Administration*	 30	 174	 N/A	 204
<p>*Unlike typical industry data, these industry groups include government employment--except federal. New hires represent employees on a firm's payroll who weren't on the payroll in the previous quarter. Source: Utah Department of Workforce Services.</p>				

CURRENT INDUSTRIAL BASE

Four of the 11 major industry sectors in the service area account for 72 percent of all jobs.

Manufacturing is the largest contributor of jobs (24 percent) in the ESA. Government, including Education (public and higher education) account for 22 percent of total jobs. Trade, transportation and utilities account for 16 percent of the total. Healthcare adds another 10 percent of total employment.

Industry Employment Distribution					
Bear River ESA					
	Share of 2010 Nonfarm Employment by Industry				
	Box Elder	Cache	Rich	Total ESA	Statewide
Mining	0.2%	0.0%	1.2%	0.1%	0.9%
Construction	6%	5%	6%	5%	6%
Manufacturing	34%	21%	1%	24%	9%
Trade, Transportation, Utilities	20%	15%	13%	16%	4%
Information	1%	1%	0%	1%	2%
Financial Activities	2%	3%	6%	3%	6%
Professional & Business Services	3%	11%	2%	9%	13%
Education & Health Services	9%	11%	8%	10%	3%
Leisure and Hospitality	8%	8%	22%	8%	9%
Other Services	2%	2%	7%	2%	3%
Government	15%	24%	34%	22%	18%

Source: Utah Department of Workforce Services.

FIRM SIZE

In the service area 76 percent of all 4,550 establishments employ less than 10 workers. These roughly 3,370 worksites employed 8,740 (13.2 percent) of the 66,520 total employed in the area. On the other hand, just 10 companies had 500 or more workers and accounted for 22 percent of all the employment in the ESA.

B. DEMOGRAPHICS OF LABOR FORCE AND CUSTOMER GROUPS

This report will examine several demographic groups:

- **Labor Force**—individuals living in the area which are over the age of 16 and are considered employed or unemployed (to be considered unemployed an individual must be searching for work).
- **Nonfarm Jobs or Nonfarm Employment**—jobs are counted by place of employment rather than by residence. Also, an individual can have more than one job.
- **UI/EB Claimants**—Individuals filing a weekly claim for unemployment insurance for the week including the 12 of the month under the state unemployment program or state extended benefits program (does not include federal or military workers.)
- **DWS Intensive/Training Customers**—those customers of the Department of Workforce Services who are case-managed or are receiving training assistance.
- **DWS Assisted Customers**—those customers who received a recorded employment-related service from a DWS employee, but were not case-managed or receiving training assistance.
- **DWS Self-Directed Customers**—those customers using our online employment services only.

COMMUTER PATTERNS

Commuting in the service area reflects that most people who live in the area work in the area. Over 85 percent of workers who reside there also work there. In Cache County that number rises to 91.3 percent but in Box Elder and Rich counties the percentage is nearly identical at 73.0 percent.

Labor Force Commuting Patterns 2005-2009













Bear River ESA

	Worked in County of Residence	Outside Resident County in Utah	Worked Outside of Utah
STATE OF UTAH	85.9%	12.1%	1.9%
Bear River ESA	73.1%	26.2%	0.8%
Box Elder County	91.3%	6.5%	2.1%
Cache County	73.6%	8.5%	17.9%
Rich County	88.9%	5.3%	5.8%

Source: U.S. Census Bureau; American Community Survey.

COUNTY PATTERNS

In terms of labor force, jobs, unemployment claimants, and DWS customers in the area, Cache County accounts for 73 percent of the ESA's labor force and total jobs. Cache also claims 53 percent of all ESA claimants and 63 percent of all DWS Customers. Box Elder County makes up 26 percent of the labor force and 25 percent of the total employed but, because of its recessionary posture, accounts for 46 percent of all ESA claimants. Most DWS customers (not claimants) are in Cache County. Rich County's share of the total in all categories is one percent. There are more claimants in Box Elder County (whose economy is struggling) but most of the DWS customers are in Cache (where the economy is much better).

















































Jobs, Labor Force, UI Claimants, and Customers Bear River ESA					
	Share of ESA Total				
	2010 Nonfarm Jobs	2005-2009 Labor Force	March 2011 UI/EB Claimants	March 2011 DWS Customers	
Box Elder County	 25.1%	 25.7%	 46.0%	 35.6%	
Cache County	 73.4%	 72.7%	 53.0%	 63.4%	
Rich County	 1.5%	 1.5%	 1.0%	 1.0%	
Source: Utah Department of Workforce Services.					

AGE

Individuals between the ages of 25 and 34 make up the largest share of each of five comparison groups for analysis (employed, claimants, DWS self-directed customers, DWS assisted customers, and DWS intensive/training customers). They make up roughly 18 percent of jobs and the 18 percent of the labor force. However, they account for an even larger share of individuals who have contact with DWS services. About one-third of DWS customers receiving either self-assisted, DWS assisted, or intensive and/or training services range between 25 and 34 years of age. The next largest age groups of individuals are 35-44 and 45-54. These two older groups combined accounted for nearly 40 percent of the total. Twenty-eight percent of claimants are in the 25-34 age groups but also they have a significant presence in the 35-44 (20 percent) and the 45-54 (24 percent) age group. Clearly, the primary age group of concern for getting claimants back to work is the 25-34 year olds

Age of Demographic/Customer Groups

Bear River ESA

	2005-2009 Labor Force*	2009 Employ- ment	March 2011 UI/EB Claimants	March 2011 DWS Customers		
				Intensive/ Training	Assisted	Self Directed
18 and under	 10%	 4%	 0%	 8%	 2%	 4%
19-21	 10%	 6%	 4%	 13%	 7%	 12%
22-24	 14%	 6%	 7%	 10%	 10%	 14%
25-34	 18%	 23%	 28%	 27%	 33%	 34%
35-44	 18%	 19%	 20%	 20%	 20%	 16%
45-54	 18%	 22%	 24%	 16%	 18%	 12%
55-64	 10%	 15%	 15%	 6%	 10%	 7%
65 and Older	 2%	 4%	 2%	 1%	 1%	 1%

*Labor force age grouping is "19 and under" and "20-21 years."































Source: U.S. Census Bureau and Utah Department of Workforce Services.

EDUCATION

Educational attainment in the population in the three counties is very similar. About 91 percent of persons in each of the three counties have a high school diploma or higher (for those persons 25 years old or older). The educational attainment of unemployment claimants is different. About 60 percent of claimants have a high school diploma or higher (includes GED). Further, about 13 percent of claimants have less than a high school degree. In perspective of the three categories of DWS customers, 16 percent of the intensive/training customers had less than a HS degree but only 3-4 percent of the DWS-assisted and self-directed customers lacked the basic degree. Overall, 60 percent of all DWS assisted customers had a high school degree. About 10 percent of claimants and DWS customers had Bachelor's Degrees, which is evidence that there is a direct relationship between educational attainment and the level of unemployment and the duration of unemployment.

Education of Demographic/Customer Groups

Bear River ESA

	2005-2009 Population 18-24	2005-2009 Population 25 & Older	March 2011 UI/EB Claimants	March 2011 DWS Customers		
				Intensive/ Training	Assisted	Self Directed
Less Than High School	 6%	 8%	 13%	 16%	 3%	 4%
High School	 27%	 27%	 32%	 57%	 59%	 58%
Post-Secondary, Some College	 61%	 35%	 17%	 15%	 28%	 24%
Bachelor's or Higher	 7%	 30%	 11%	 4%	 8%	 11%
Not Reported/Unkown	 0%	 0%	 28%	 8%	 3%	 3%

Source: U.S. Census Bureau and Utah Department of Workforce Services.

OCCUPATIONS

The occupations of DWS customers show some interesting relationships. One anomaly though is the high frequency of management occupations. This appears to be a mistake in the coding of individuals. There is wide dispersion of occupations of the DWS customers and the occupations characteristics of UI claimants. In many groups there is similarity but in others there are big differences. Notable among the differences between the proportion of DWS customers and claimants were in the management, food prep and service, office and administrative support, construction, production, and transportation occupations.

Occupations of Demographic/Customer Groups Bear River ESA						
	2005-2009 Employment	March 2011 UI/EB Claimants	March 2011 DWS Customers			
			Intensive/ Training	Assisted	Self Directed	
Management	8%	7%	16%	24%	21%	
Business/Financial	3%	3%	4%	4%	4%	
Computer/Mathematical	2%	2%	4%	2%	3%	
Architecture/Engineering	3%	4%	4%	5%	4%	
Life/Physical/Social Science	2%	1%	1%	1%	2%	
Community/Social Services	1%	0%	3%	3%	3%	
Legal	0%	0%	0%	1%	1%	
Education/Library	9%	2%	5%	4%	4%	
Arts/Design/Entertainment/Sports	2%	1%	4%	3%	5%	
Healthcare Practitioners/Technical	3%	2%	6%	3%	4%	
Healthcare Support	2%	1%	7%	4%	4%	
Protective Service	1%	1%	4%	4%	3%	
Food Preparation/Serving	5%	3%	12%	9%	9%	
Building/Grounds Cleaning	4%	3%	7%	7%	4%	
Personal Care/Service	3%	1%	2%	1%	1%	
Sales	10%	7%	5%	4%	6%	
Office/Administrative Support	15%	12%	5%	7%	8%	
Farming/Fishing/Forestry	1%	2%	1%	1%	1%	
Construction/Extraction	5%	19%	4%	7%	7%	
Installation/Maintenance/Repair	3%	5%	1%	2%	2%	
Production	11%	15%	3%	3%	3%	
Transportation /Material Moving	6%	9%	0%	1%	1%	

Source: U.S. Census Bureau and Utah Department of Workforce Services.

RACE AND ETHNICITY

In the service area only about 13 percent of the population is minority. Of the 13 percent 9.4 percent are Hispanic. This makes Hispanics the largest minority group. Rich County has the smallest ethnic minority with 5.8 percent of which 4.2 percent are Hispanic. Box Elder County has 11.7 percent minority with 8.3

percent Hispanic and Weber County has a 14.5 percent minority population of which 10.0 percent are Hispanic.

Minority Population Bear River ESA				
	Total*	Percent White	Percent Minority	
	Population	not Hispanic	not Hispanic	Hispanic
STATE OF UTAH	2,763,885	80.4%	6.7%	13.0%
Bear River ESA	164,895	86.4%	4.2%	9.4%
Box Elder County	49,975	88.3%	3.4%	8.3%
Cache County	112,656	85.5%	4.6%	10.0%
Rich County	2,264	94.1%	1.6%	4.2%
*Total population - 2010 April 1st census count.				
Source: U.S. Census Bureau, 2010 Census				

POVERTY RATES

The recession has caused poverty rates to increase. The U.S. Poverty rate (2005-2009) was 13.5 percent. Utah's corresponding rate was 10.4 percent. In the Bear River Service Area the county rates were Box Elder (8.5 percent), Cache (15.3 percent) and Rich (6.8 percent). For the population as a whole, the service area is obviously doing much better than the nation and, with the exception of Cache County, much better than the state average. Cache's high stated poverty rate is primarily due to Utah State University. Students are typically younger with lower income and live in group quarters. Also, they typically receive income from parents or other sources not always reflected in the poverty estimates. What one demographic factor is most likely to increase the probability of being in poverty? Be a child in a female-headed household. In addition, children in general are more likely to be "poor." In all counties, poverty rates for children under 18 are higher than for the general population. All three counties have rates about 10 to 12 percent, right at the state average. Poverty rates for the population age 65 and over are slightly higher than the state average of 6.8 percent.

Poverty Rates 2005-2009			
Bear River ESA			
	Poverty Rates		
	All Individuals	Children Under 18	65 and Over
Utah Statewide	10.4%	11.0%	6.8%
Box Elder County	9%	11%	6.0%
Cache County	15%	13%	8.2%
Rich County	7%	10%	10.7%
Source: U.S. Census Bureau, American Community Survey 2005-2009.			

C. FUTURE ECONOMIC ACTIVITY

Industry and occupational employment projections for the Bear River Service Area were created in part from the Metro Utah projections and part from the Cache County projections. Box Elder County is part of the Metro projections set and Cache has its own projections. The analysis uses both sets as they relate the industries and occupations in the service area. The two graphs below (industry and occupation) present information in table form. Generally, the outlook for Box Elder County continues to be one of little or no growth as its economy adjusts to the more general recovery experienced outside the county. Cache County's economy has turned the corner and is growing once again, but slowly. Rich County is struggling to maintain its current level of jobs and the seasonality and lack of construction are not helping in its recovery. Unemployment should moderate in the service area as the overall economy starts to show more growth. The "recovery" will happen but it will take time – months or even years for full recovery.

INDUSTRY PROJECTIONS

The projections of industries for Utah spans the 2008-2018 time period. In the Bear River ESA only Box Elder County is part of the nine-county Metro-Utah labor market area. The Metro Utah area will see some 250,000 new jobs over the 10 year period. Box Elder, as part of Metro will share in just some of that growth. Cache County will grow by an annual rate of 2.2 percent. The largest industries now will continue to be the dominant industries in the future. One exception will be manufacturing in Box Elder County where losses in the transportation equipment manufacturing industry and particularly in federally-funded launch systems have changed. Other manufacturing will still be strong as will retail trade, professional business services, and education and healthcare, and government. The fastest growing industries will be professional and business services, healthcare, and self-employed. All industries except agriculture will experience growth but some, like those mentioned above, will grow

faster than the 2.1 to 2.2 percent average for all industries. Remember that “industries” drive the economies and determine kinds and number of occupations (jobs) that will be needed in the economy.

Industry Projections								
Bear River ESA								
	Metro Industry Projections				Cache Industry Projections			
	Employment		New Jobs 2008-2018	Annual Growth Rate	Employment		New Jobs 2008-2018	Annual Growth Rate
	2008	2018			2008	2018		
Covered Agriculture/Forestry/Fishing	9,010	8,260	-750	-0.8%	1,880	1,720	-160	-0.9%
Mining	3,480	3,960	480	1.4%	10	10	0	0.0%
Construction	73,800	87,370	13,570	1.8%	2,800	3,350	550	2.0%
Manufacturing	107,170	113,480	6,310	0.6%	10,870	11,800	930	0.9%
Wholesale Trade	43,460	51,200	7,740	1.8%	940	1,070	130	1.4%
Retail Trade	122,480	144,970	22,490	1.8%	5,640	6,860	1,220	2.2%
Transportation and Warehousing	43,910	49,570	5,660	1.3%	1,120	1,350	230	2.1%
Utilities	2,430	2,720	290	1.2%	60	60	0	0.0%
Information	28,100	33,010	4,910	1.7%	580	670	90	1.6%
Financial Activities	67,050	79,670	12,620	1.9%	1,650	1,910	260	1.6%
Professional and Business Services	147,680	190,650	42,970	2.9%	5,500	7,200	1,700	3.1%
Educational, Health and Social Services*	194,560	262,260	67,700	3.5%	11,230	15,590	4,360	3.9%
Leisure and Hospitality	91,710	110,180	18,470	2.0%	3,590	4,600	1,010	2.8%
Other Services	32,590	36,600	4,010	1.2%	1,180	1,540	360	3.1%
Government*	78,480	92,870	14,390	1.8%	2,970	3,610	640	2.2%
Self-Employed, Unpaid Family Workers	162,230	194,700	32,470	2.0%	7,520	9,000	1,480	2.0%

* Public hospitals and education are included in the Educational/Health/Social Services industry and excluded from government. U.S. Postal Service employment is included in transportation warehousing.
Source: Utah Department of Workforce Services

























































































OCCUPATIONAL PROJECTIONS

The occupational projections for the Metro area and the Cache County area are available on the website: <http://jobs.utah.gov/wi/pubs/outlooks/utahjoboutlook/index.html> . The Bear River ESA is split between the Metro-Utah and the Cache County occupational projections. Because of this, and to aid the service areas in identifying occupations more appropriate for training, WRA has produced Training Occupations lists for each service area. These are provided on-line. The Occupations for Training List for the Bear River Service Area specifies those occupations that have training potential, labor market demand, and better wages.

The graph below presents occupational projections for occupational categories and not individual job titles. It provides more summary information about the occupations in the area in the form of the share of job openings and the level of occupational growth expected in the two areas. The compositions of the category shares are similar in both areas with management, business/financial, education, healthcare, food preparation, sales, and office and administrative having larger shares of job demand.

Occupational Projections 2008-2018

Bear River ESA

	Metro Utah*		Cache County	
	Share of Projected Job Openings	Projected Occupational Annual Growth	Share of Projected Job Openings	Projected Occupational Annual Growth
Management	 5%	 1.5%	 5%	 1.3%
Business/Financial	 5%	 2.8%	 3%	 3.0%
Computer/Mathematical	 3%	 2.8%	 2%	 2.9%
Architecture/Engineering	 2%	 1.8%	 2%	 3.0%
Life/Physical/Social Science	 1%	 3.1%	 3%	 3.3%
Community/Social Services	 2%	 3.0%	 2%	 2.9%
Legal	 1%	 2.1%	 0%	 2.1%
Education/Library	 6%	 2.8%	 8%	 3.1%
Arts/Design/Entertainment/Sports	 2%	 2.1%	 2%	 2.2%
Healthcare Practitioners/Technical	 5%	 3.7%	 5%	 4.1%
Healthcare Support	 3%	 4.8%	 4%	 6.0%
Protective Service	 2%	 2.4%	 1%	 2.8%
Food Preparation/Serving	 8%	 2.2%	 7%	 2.8%
Building/Grounds Cleaning	 3%	 2.1%	 3%	 2.2%
Personal Care/Service	 4%	 2.6%	 4%	 3.6%
Sales	 13%	 1.8%	 12%	 1.8%
Office/Administrative Support	 16%	 1.9%	 14%	 2.0%
Farming/Fishing/Forestry	 0%	 -0.4%	 1%	 -0.6%
Construction/Extraction	 6%	 1.9%	 5%	 2.0%
Installation/Maintenance/Repair	 3%	 1.9%	 3%	 2.3%
Production	 5%	 0.9%	 9%	 1.2%
Transportation /Material Moving	 6%	 1.5%	 5%	 1.4%

*Metro includes Box Elder, Weber, Davis, Morgan, Tooele, Salt Lake, Summit, Juab, and Utah counties.

Source: Utah Department of Workforce Services.

SKILL-BASED PROJECTIONS

By combining occupational projections and skills/knowledge areas from the O*Net database, it is possible to determine which skills will be in high demand in the future. It may be tempting to focus only on technical skills or healthcare skills or computer skills when training the labor force. However, skill-based projections show that basic skills provide the underlying foundation from which these other technical skills can be learned.

As the accompanying table shows, basic skills such as “reading, writing and arithmetic” rise to the top of the list for in-demand skills and knowledge areas. Being accomplished in learning new skills, critical thinking, and time management will also be important for jobs today and in the future. Interestingly,

projections indicate that an acquaintance with customer service techniques is the most important knowledge area.

Below are the skills and knowledge categories ranked in order of importance that originate from the occupational skills projections for both the Metro and Cache geographic areas. The order of importance is very similar. Active listening, reading comprehension, and critical thinking are the top three skills with customer and personal service, English language knowledge most important in the knowledge information.

Skills and Knowledge Projections							
Bear River ESA							
Metro** Utah				Cache County			
Top In-Demand Skills		Top in-Demand Knowledge Areas		Top In-Demand Skills		Top in-Demand Knowledge Areas	
	Projected 2008-2018 Annual Employment		Projected 2008-2018 Annual Employment		Projected 2008-2018 Annual Employment		Projected 2008-2018 Annual Employment
Active Listening	30,127	Customer and Personal Service	27,002	Reading Comprehension	1,395	Customer and Personal Service	1,222
Reading Comprehension	29,979	English Language	11,798	Active Listening	1,370	English Language	575
Critical Thinking	26,749	Mathematics	8,632	Critical Thinking	1,205	Education and Training	409
Speaking	23,720	Clerical	8,368	Speaking	1,102	Mathematics	386
Active Learning	23,397	Education and Training	7,451	Coordination	1,077	Clerical	373
Coordination	23,119	Computers and Electronics	7,288	Active Learning	1,076	Computers and Electronics	324
Monitoring	21,077	Administration and Management	6,136	Instructing	1,020	Psychology	274
Writing	20,629	Sales and Marketing	6,005	Monitoring	981	Administration and Management	270
Instructing	20,081	Psychology	5,040	Writing	959	Sales and Marketing	266
Time Mgmt	19,428	Mechanical	4,390	Time Mgmt	910	Mechanical	203
*Employment in occupations in which the listed skill or knowledge area is at least moderately important to job performance, and the occupation requires at least a moderate level of skill-related competence.							
**Metro includes Box Elder, Weber, Davis, Morgan, Tooele, Salt Lake, Summit, Juab, and Utah counties.							
Source: Utah Department of Workforce Services 2008-2018 Occupational Employment Projections.							

II. WASATCH FRONT NORTH ECONOMIC SERVICE AREA: Weber, Davis, and Morgan Counties

By John Mathews, Economist

A. CURRENT ECONOMY

BRIEF OVERVIEW

The ESA's economy fared better in 2010 than in previous recession years. Employment in Davis County actually experienced slight growth through the year. This was somewhat offset by the continuing loss of jobs, albeit slowing, in Weber County. The Wasatch Front North ESA is through the worst of the economic downturn. Unemployment in the ESA averaged 7.8 percent in 2010 which was just slightly higher than for the state. Davis County's jobless rate was 7.1 percent which was a percentage point and a half below the Weber rate of 8.6 percent. So far into March of 2011 the unemployment rates for both counties have dropped by a half a point. Construction continued to shed jobs while manufacturing stayed even. Growth occurred in business services, healthcare, and the government industry sectors. Spending was still off, but only by about two percent in 2010. Construction permitting and valuation were down in both Davis and Weber counties. Evidence is fairly clear that the area's economy is improving but it will take months or even years to fully recover from the recession. . The graph on job change below shows the most current month (December) year-over change. For unemployment, the annual averages are shown in that graph.

Job Growth by Industry

Wasatch Front North ESA

	Dec 2009 to Dec 2010 Change in Nonfarm Jobs			
	Davis	Morgan	Weber	Total ESA
Total Percent Change	1.2%	0.7%	-0.3%	0.5%
Mining	-20	3	25	8
Construction	-441	-21	-366	-828
Manufacturing	616	-6	268	878
Wholesale Trade	-109	-3	46	-66
Retail Trade	-174	0	-236	-410
Transportation & Warehousing	-125	-3	-48	-176
Utilities	0	0	-13	-13
Information	72	1	-171	-98
Financial Activities	-286	1	-94	-379
Professional & Business Services	598	-1	48	645
Private Education	188	-4	27	211
Healthcare and Social Services	282	21	131	434
Leisure and Hospitality	373	-6	13	380
Other Services	5	8	-52	-39
Government	209	23	146	378

Source: Utah Department of Workforce Services.

DAVIS COUNTY

Insulated from significant impacts of the recession (because of Hill Air Force Base) this county is on the cusp of job growth. Unemployment is easing from the 7.2 percent in March of 2010 to 6.7 in March of 2011. Job growth for the year of 2010 was positive at 0.5 percent. December of 2010's job growth was much better at 1.2 percent. Spending in the fourth quarter of 2010 was down slightly as was construction permitting and construction valuation. Some positive signs in this area show there is demand for housing but the market is cautious and financing is not as easy to get.

MORGAN COUNTY

Job growth in 2010 was down, but just a little in the county. By the end of 2010 improvement brought the job counts back to the positive side of the ledger where growth was 0.7 percent. Most growth was in healthcare and government. Unemployment in 2010 averaged 7.4 percent. Currently that rate is down to 7.0 percent (March 2011).

WEBER COUNTY

Job losses continue in Weber County but the rate is slowing. Job counts were down -1.4 percent in 2010. By the end of the year the bleeding slowed to -0.3 percent as the economy started to wake up. Virtually all major employment sectors lost jobs from 2009 to 2010. By the end of the year (2010) important sectors such as manufacturing and healthcare had more workers on the payroll than last year. Construction, as in most counties, is still shedding jobs. The unemployment rate for 2010 was 8.6 percent. That rate is now 8.2 percent (March 2011). Even with negative year-over changes in various economic indicators, the economy is getting better. Spending is off, but less than one percent, much better than in the last few years. Construction activity, both in terms of permitting and total valuation is still on the down side but as the economy improves and the population's perceptions of better times ahead gets seated, the pent-up demand for housing will reveal itself.

Note: In this expanded analysis additional text and graphs have been added to aid the reader in understanding the economies of the service area.

Unemployment Rates				
Wasatch Front North ESA				
	Annual Unemployment Rates			
	2007	2008	2009	2010
STATE OF UTAH	2.8%	3.7%	7.1%	7.7%
Total ESA	3.0%	3.9%	7.1%	7.8%
Davis County	2.7%	3.5%	6.4%	7.1%
Morgan County	2.8%	3.5%	6.1%	7.4%
Weber County	3.3%	4.4%	8.1%	8.6%
Source: Utah Department of Workforce Services				

RECENT HIRING ACTIVITY

Most hiring activity occurred in the industry sectors where most of the employment is. Interesting to note is that even in an economy just starting to pull out of a recession, there are thousands of new hiring transactions. In third quarter of 2010 26,500 new hiring transactions occurred in the ESA. About 52 percent were in Davis County with 47 percent in Weber County. Industries with most of the new hiring were construction, retail trade, business services, healthcare, accommodation and food services.

New Hires by Industry*

Wasatch Front North ESA

	Third Quarter 2010 New Hires			
	Davis	Morgan	Weber	Total ESA
Agriculture (covered)	75	3	38	116
Mining	7	N/A	N/A	7
Construction	1,278	49	864	2,191
Manufacturing	745	10	793	1,548
Wholesale Trade	322	3	196	521
Retail Trade	2,007	30	2,007	4,044
Transportation & Warehousing	745	4	355	1,104
Utilities	9	N/A	8	17
Information	229	N/A	66	295
Financial Activities	395		425	820
Professional & Business Services	3,384	11	3,179	6,574
Education, Healthcare, Social Svcs	1,881	59	2,026	3,966
Leisure and Hospitality	2,195	24	1,692	3,911
Other Services	479	9	553	1,041
Public Administration*	185	13	207	405

*Unlike typical industry data, these industry groups include government employment--except federal. New hires represent employees on a firm's payroll who weren't on the payroll in the previous quarter.
Source: Utah Department of Workforce Services.

CURRENT INDUSTRIAL BASE

Five of the 11 major industry sectors in the service area account for over 75 percent of all jobs. Government (federal, state, and local) is the largest contributor of jobs (24 percent) in the area, mainly because of Hill Air Force Base's presence. Education – public and higher education – are also included in the government sector. Trade, transportation and utilities account for 19 percent of total jobs. Manufacturing, business services, and healthcare each claimed a 11-12 percent slice of the jobs pie for the Wasatch Front North ESA. The Wasatch Front ESA is very much like the state in industry composition with the exception of a little more manufacturing and much more government employment.

Industry Employment Distribution

Wasatch Front North ESA

	Share of 2010 Nonfarm Employment by Industry				
	Davis	Morgan	Weber	Total ESA	Statewide
Mining	0.1%	0.6%	0.1%	0.1%	0.9%
Construction	7%	17%	5%	6%	6%
Manufacturing	9%	11%	13%	11%	9%
Trade, Transportation, Utilities	19%	20%	18%	19%	19%
Information	1%	0%	1%	1%	2%
Financial Activities	4%	3%	5%	4%	6%
Professional & Business Services	12%	6%	10%	11%	13%
Education, Health, & Social Svcs	11%	7%	13%	12%	13%
Leisure and Hospitality	10%	9%	9%	9%	9%
Other Services	3%	2%	3%	3%	3%
Government	25%	25%	23%	24%	18%

Source: Utah Department of Workforce Services.

FIRM SIZE

In the service area 73 percent of all 12,500 establishments employ less than 10 workers. These roughly 9,200 worksites employed 25,000 of the 188,000 total employed in the area. On the other hand, just 22 companies had 500 or more workers and five of these 22 each employ 1,000 or more staff.

B. DEMOGRAPHICS OF LABOR FORCE AND CUSTOMER GROUPS

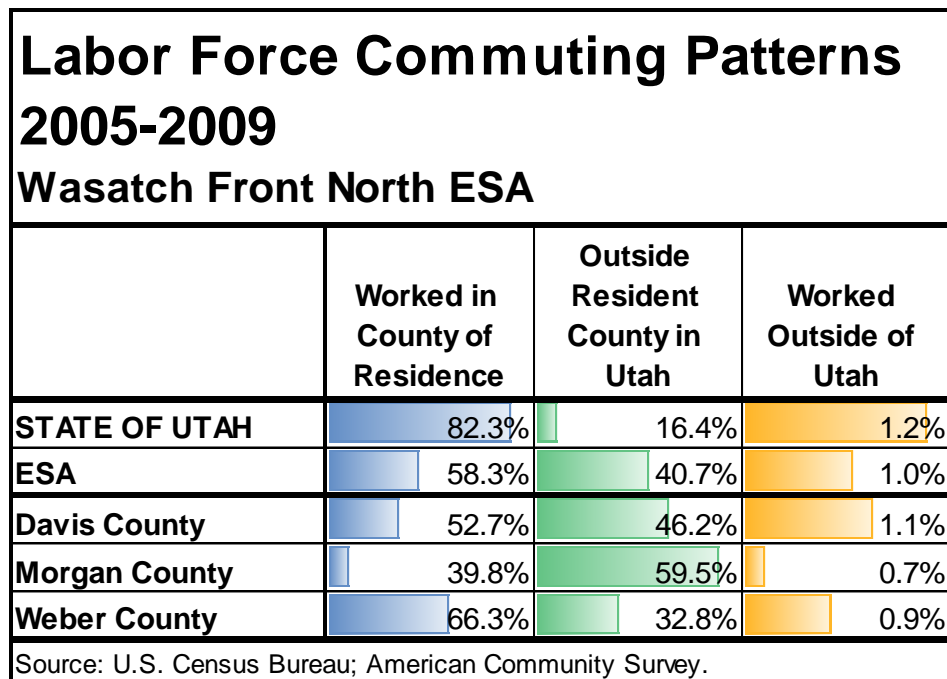
This report will examine several demographic groups:

- **Labor Force**—individuals living in the area which are over the age of 16 and are considered employed or unemployed (to be considered unemployed an individual must be searching for work).
- **Nonfarm Jobs or Nonfarm Employment**—jobs are counted by place of employment rather than by residence. Also, an individual can have more than one job.
- **UI/EB Claimants**—Individuals filing a weekly claim for unemployment insurance for the week including the 12 of the month under the state unemployment program or state extended benefits program (does not include federal or military workers.)
- **DWS Intensive/Training Customers**—those customers of the Department of Workforce Services who are case-managed or are receiving training assistance.

- **DWS Assisted Customers**—those customers who received a recorded employment-related service from a DWS employee, but were not case-managed or receiving training assistance.
- **DWS Self-Directed Customers**—those customers using our online employment services only.

COMMUTER PATTERNS

Commuting in the service area is a real mix. Nearly half of Davis County residents work outside the county. In Morgan, that percentage is even higher – 59.5 percent. Weber County’s out-of-county workers amount to about a third of those on payrolls. Most of Davis County’s commuters travel to Salt Lake County for work.



COUNTY PATTERNS

In terms of labor force, jobs, unemployment claimants, and DWS customers in the area, Davis County accounts for 55 percent of labor force and 50 percent of total jobs, with 47 percent of the area's total claimants and DWS Customers. Weber County holds 43 percent of the labor force and 43 percent of the total jobs while claiming a higher than proportional share in both claimants and DWS customers at 52 percent. Morgan County's share of the total in all categories is about one percent. The point is that even though Davis County has more jobs and population, Weber County has the most people that need help in terms of claims and DWS Service.

Jobs, Labor Force, UI Claimants, and Customers Wasatch Front North ESA				
	Share of ESA Total			
	2010 Nonfarm Jobs	2005-2009 Labor Force	March 2011 UI/EB Claimants	March 2011 DWS Customers
Davis County	55.4%	55.0%	47.0%	46.5%
Morgan County	1.6%	1.6%	1.0%	1.0%
Weber County	43.0%	43.4%	52.0%	51.5%
Source: Utah Department of Workforce Services.				

AGE

Individuals between the ages of 25 and 34 make up the largest share of each demographic group in the Wasatch Front North ESA. They make up roughly one-fourth of both jobs and the labor force. However, they account for an even larger share of individuals who have contact with DWS services. About one-third of DWS customers receiving either self-assisted, DWS assisted, or intensive and/or training services range between 25 and 34 years of age. The next largest age groups of individuals are 35-44 and 45-54. These two older groups combined accounted for another 40 percent of the total.































Age of Demographic/Customer Groups Wasatch Front North ESA						
	2005-2009 Labor Force*	2009 Employ- ment	March 2011 UI/EB Claimants	March 2011 DWS Customers		
				Intensive/ Training	Assisted	Self Directed
18 and under	7%	7%	0%	5%	2%	3%
19-21	4%	7%	4%	11%	6%	10%
22-24	8%	8%	8%	11%	9%	11%
25-34	27%	25%	30%	32%	33%	33%
35-44	20%	20%	22%	22%	23%	19%
45-54	20%	19%	22%	14%	18%	15%
55-64	11%	11%	13%	5%	9%	8%
65 and Older	3%	3%	2%	0%	1%	1%

*Labor force age grouping is "19 and under" and "20-21 years."
Source: U.S. Census Bureau and Utah Department of Workforce Services.

EDUCATION

Educational attainment of the population in the three counties varies. Persons with a high school diploma or higher (for those persons 25 years old or older) runs from 88.6 percent in Weber County to 96.5 percent in Morgan County and 94.9 percent in Davis County. The educational attainment of unemployment claimants in the ESA is lower. About 81 percent of claimants have a high school diploma or higher (includes GED). Further, about 14 percent of claimants have less than a high school degree.

In the perspective of the three categories of DWS customers, 14 percent of the intensive/training customers had a HS degree, but only 3-4 percent of the DWS-assisted and self-directed customers lacked the basic degree. Overall, 60 percent of all DWS assisted customers had a high school degree. A very small percentage of claimants and DWS customers had Bachelor's Degrees, which is evidence that there is a direct relationship between educational attainment and the level of unemployment and the duration of unemployment.

Education of Demographic/Customer Groups						
Wasatch Front North ESA						
	2005-2009 Population 18-24	2005-2009 Population 25 & Older	March 2011 UI/EB Claimants	March 2011 DWS Customers		
				Intensive/ Training	Assisted	Self Directed
Less Than High School	 15%	 8%	 14	 14%	 3%	 4%
High School	 37%	 27%	 60	 59%	 58%	 57%
Post-Secondary, Some College	 44%	 38%	 18	 19%	 28%	 25%
Bachelor's or Higher	 4%	 28%	 3	 1%	 8%	 10%
Not Reported/Unkown	 0%	 0%	 5	 8%	 4%	 3%

Source: U.S. Census Bureau and Utah Department of Workforce Services.

OCCUPATIONS

The occupations of DWS customers show some interesting relationships. One anomaly though is the high frequency of management occupations. This appears to be a mistake in the coding of individuals. There is wide dispersion of occupations of the DWS customers and the occupational characteristics of UI claimants. In many groups there is similarity but in others there are big differences. Notable among the differences between the proportion of DWS customers and claimants were in the management, food prep and service, office and administrative support, construction, production, and transportation occupations.

Occupations of Demographic/Customer Groups Wasatch Front North ESA					
	2005-2009 Employment	March 2011 UI/EB Claimants	March 2011 DWS Customers		
			Intensive/ Training	Assisted	Self Directed
Management	9%	8%	17%	29%	23%
Business/Financial	5%	4%	3%	5%	6%
Computer/Mathematical	3%	2%	4%	3%	3%
Architecture/Engineering	3%	2%	2%	4%	3%
Life/Physical/Social Science	1%	1%	1%	1%	1%
Community/Social Services	1%	1%	3%	3%	2%
Legal	1%	0%	1%	1%	1%
Education/Library	5%	1%	3%	2%	3%
Arts/Design/Entertainment/Sports	2%	1%	3%	3%	4%
Healthcare Practitioners/Technical	4%	2%	6%	3%	3%
Healthcare Support	2%	2%	8%	3%	4%
Protective Service	2%	1%	4%	3%	3%
Food Preparation/Serving	4%	3%	17%	9%	8%
Building/Grounds Cleaning	3%	4%	7%	7%	4%
Personal Care/Service	3%	1%	3%	1%	2%
Sales	12%	8%	7%	6%	7%
Office/Administrative Support	16%	17%	5%	5%	9%
Farming/Fishing/Forestry	0%	2%	0%	0%	1%
Construction/Extraction	6%	17%	4%	7%	6%
Installation/Maintenance/Repair	4%	5%	1%	2%	2%
Production	7%	10%	2%	2%	2%
Transportation /Material Moving	6%	8%	0%	1%	1%

Source: U.S. Census Bureau and Utah Department of Workforce Services.

RACE AND ETHNICITY

In the service area about 17 percent of the population is minority. Of the 17 percent 11.8 percent are Hispanic. This makes Hispanics the largest minority group. Morgan County has the smallest ethnic minority with 3.9 percent of which 2.4 percent are Hispanic. Davis County has 14.2 percent minority with 8.4 percent Hispanic and Weber County has a 21.9 percent minority population of which 16.7

percent are Hispanic. In Ogden City, Hispanics account for 27.5 percent of total population (ACS 2005-2009).

Minority Population Wasatch Front North ESA				
	Total* Population	Percent White Not Hispanic	Percent Minority	
			Not Hispanic	Hispanic
STATE OF UTAH	2,763,885	80.4%	6.7%	13.0%
Wasatch Front North	547,184	82.7%	5.4%	11.8%
Davis County	306,479	85.8%	5.8%	8.4%
Morgan County	9,469	96.1%	1.5%	2.4%
Weber County	231,236	78.1%	5.1%	16.7%
*Total population - 2010 April 1st census count. Source: U.S. Census Bureau, 2010 Census				

POVERTY RATES

The recession has caused poverty rates to increase. The U.S. Poverty rate (2005-2009) was 13.5 percent. Utah's corresponding rate was 10.4 percent. In the Wasatch Front North service area the county rates were Davis (6.0 percent), Morgan (3.1 percent) and Weber (11.2 percent). For the population as a whole, the service area is obviously doing much better than the nation and with the exception of Weber County, much better than the state average. What one demographic factor is most likely to increase the probability of being in poverty? Being a child in a female-headed household. In addition, children in general are more likely to be "poor." In all counties, poverty rates for children under 18 are higher than for the general population. Weber County suffers a very high – 15.3 percent – rate for the percent of children in poverty under 18. This is more than twice the 6.8 percent rate for Davis County and nearing the U.S. average of 18.2 percent. Poverty rates for the population age 65 and over are low in the service area counties.

Poverty Rates 2005-2009 Wasatch Front North ESA			
	Poverty Rates		
	All Individuals	Children Under 18	65 and Over
Utah Statewide	10.4%	11.0%	6.8%
Davis County	6.0%	6.8%	5.2%
Morgan County	3.1%	3.4%	1.4%
Weber County	11.2%	15.3%	6.6%
Source: U.S. Census Bureau, American Community Survey 2005-2009.			

C. FUTURE ECONOMIC ACTIVITY

Industry and occupational employment projections for the Wasatch North Service Area were created from the Metro Utah labor market area. This includes the Wasatch Front Counties because they all are the basis of the labor market area. People can work and live in this basic 50 mile radius circle around Salt Lake City. The Wasatch Front North Economy will improve this year and next. Job growth will likely occur in Davis County before it does in Weber County. Unemployment rates will slowly slip toward more pre-recession levels. The “recovery” will be slow.

INDUSTRY PROJECTIONS

The projections of industries for Utah spans the 2008-2018 period. In Metro-Utah the largest industries are manufacturing, retail trade, professional business services, and education and healthcare. During the projections period roughly 250,000 new jobs will be created in the metro area (including the Wasatch Front North, Wasatch Front South, and Mountainland service areas). The fastest growing industries will

Industry Projections Wasatch Front North ESA

	Metro Industry Projections			
	Employment		New Jobs 2008-2018	Annual Growth Rate
	2008	2018		
Covered Agriculture/Forestry/Fishing	9,010	8,260	-750	-0.8%
Mining	3,480	3,960	480	1.4%
Construction	73,800	87,370	13,570	1.8%
Manufacturing	107,170	113,480	6,310	0.6%
Wholesale Trade	43,460	51,200	7,740	1.8%
Retail Trade	122,480	144,970	22,490	1.8%
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Government*	78,480	92,870	14,390	1.8%
Self-Employed, Unpaid Family Workers	162,230	194,700	32,470	2.0%

* Public hospitals and education are included in the Educational/Health/Social Services industry and excluded from government. U.S. Postal Service employment is included in transportation warehousing.

Source: Utah Department of Workforce Services











































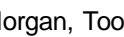

be professional and business services, healthcare, and self-employed. All industries except those in agriculture will experience growth but some, like those mentioned above, will grow faster than the 2.1 percent average for all industries. Clearly, 43 percent of all 250,000 new jobs in the metro area will be in professional and business services and healthcare.

OCCUPATIONAL PROJECTIONS

The occupational projections for the Wasatch Front North is the Metro area. They are available on the website <http://jobs.utah.gov/wi/pubs/outlooks/utahjoboutlook/index.html>. To aid the service areas in identifying occupations more appropriate for training, WRA has produced Training Occupations lists for each service area. These are provided on-line. The Occupations for Training List for the Wasatch Front North Service Area specifies those occupations that have training potential, labor market demand, and better wages. The graph below presents occupational projections for occupational categories and not individual job titles. It provides more summary information about the occupations in the area in the form of the share of job openings and the level of occupational growth expected in the two areas. The composition of the category shares are similar in both areas with education, healthcare, food preparation, sales, office and administrative, and transportation and material movement having larger shares of job openings. Occupational categories with much higher than average job growth rates (greater than 3.0 percent) include: community and social services, education, healthcare, and personal care.

Occupational Projections 2008-2018

Wasatch Front North ESA

	Metro* Utah	
	Share of Projected Job Openings	Projected Occupational Annual Growth
Management	 5%	 1.2%
Business/Financial	 2%	 2.8%
Computer/Mathematical	 0%	 2.4%
Architecture/Engineering	 1%	 2.7%
Life/Physical/Social Science	 2%	 1.7%
Community/Social Services	 2%	 3.4%
Legal	 0%	 1.8%
Education/Library	 7%	 3.2%
Arts/Design/Entertainment/Sports	 1%	 2.3%
Healthcare Practitioners/Technical	 4%	 3.7%
Healthcare Support	 3%	 5.3%
Protective Service	 2%	 2.3%
Food Preparation/Serving	 11%	 2.5%
Building/Grounds Cleaning	 4%	 1.8%
Personal Care/Service	 4%	 3.1%
Sales	 12%	 1.8%
Office/Administrative Support	 12%	 1.9%
Farming/Fishing/Forestry	 2%	 -0.5%
Construction/Extraction	 9%	 1.5%
Installation/Maintenance/Repair	 5%	 2.0%
Production	 4%	 1.6%
Transportation /Material Moving	 7%	 1.5%
*Metro includes Box Elder, Weber, Davis, Morgan, Tooele, Salt Lake, Summit, Juab, and Utah counties. Source: Utah Department of Workforce Services.		

SKILL-BASED PROJECTIONS

By combining occupational projections and skills/knowledge areas from the O*Net database, it is possible to determine which skills will be in high demand in the future. It may be tempting to focus only on technical skills or healthcare skills or computer skills when training the labor force. However, skill-based projections show that basic skills provide the underlying foundation from which these other technical skills can be learned.

As the accompanying table shows, basic skills such as “reading, writing and arithmetic” rise to the top of the list for in-demand skills and knowledge areas. Being accomplished in learning new skills, critical thinking, and time management will also be important for jobs today and in the future. Interestingly, projections indicate that an acquaintance with customer service techniques is the most important knowledge area.

Below are the skills and knowledge categories ranked in order of importance that originate from the occupational skills projections for the Metro nine-county geographic areas. The order of importance for skills is active listening, reading comprehension, critical thinking, and speaking. These are the top four skills. For in demand knowledge area customer service and personal service is at the top followed by English language, math, and clerical.

Skills and Knowledge Projections			
Wasatch Front North ESA			
Metro** Utah			
Top In-Demand Skills		Top in-Demand Knowledge Areas	
	Projected 2008-2018 Annual Employment		Projected 2008-2018 Annual Employment
Active Listening	30,127	Customer and Personal Service	27,002
Reading Comprehension	29,979	English Language	11,798
Critical Thinking	26,749	Mathematics	8,632
Speaking	23,720	Clerical	8,368
Active Learning	23,397	Education and Training	7,451
Coordination	23,119	Computers and Electronics	7,288
Monitoring	21,077	Administration and Management	6,136
Writing	20,629	Sales and Marketing	6,005
Instructing	20,081	Psychology	5,040
Time Mgmt	19,428	Mechanical	4,390
*Employment in occupations in which the listed skill or knowledge area is at least moderately important to job performance, and the occupation requires at least a moderate level of skill-related competence.			
**Metro includes Box Elder, Weber, Davis, Morgan, Tooele, Salt Lake, Summit, Juab, and Utah counties.			
Source: Utah Department of Workforce Services 2008-2018 Occupational Employment Projections.			

III. WASATCH FRONT SOUTH ECONOMIC SERVICE AREA: Salt Lake and Tooele Counties

By James Robson, Economist

A. CURRENT ECONOMY

Brief Overview

The Wasatch Front South Economic Service Area (ESA) has entered the expansion phase of economic recovery after suffering through the “great recession” of 2008/2009. Labor market conditions are on the mend with improved job, income, and business growth. Unemployment is gradually subsiding. There are still significant hangover effects from the bursting of the housing bubble and financial crises that are holding back residential construction activity, but overall renewed job growth and a gradually improving labor market will characterize economic conditions in the coming months.

Job Growth by Industry Wasatch Front South ESA				
	December 2009 to December 2010 Change in Nonfarm Jobs			
	Salt Lake	Tooele	ESA	Statewide
Total Percent Change	1.2%	3.0%	1.2%	1.2%
Mining	436	8	444	960
Construction	-71	188	117	-903
Manufacturing	418	100	518	1,209
Wholesale Trade	206	4	210	55
Retail Trade	-147	-25	-172	-1,666
Transportation & Warehousing	999	-45	954	1,448
Utilities	19	0	19	-32
Information	174	8	182	317
Financial Activities	-1,063	-26	-1,089	-1,850
Professional & Business Services	3,919	69	3,988	6,848
Educational Services (Private)	607	19	626	1,338
Healthcare and Social Services	185	-3	182	1,336
Leisure and Hospitality	897	176	1,073	3,221
Other Services	-177	-17	-194	75
Government	276	4	280	1,381
Source: Utah Department of Workforce Services.				

SALT LAKE COUNTY

The adverse effects of the economic recession on the Salt Lake County labor market continued through the first half of 2010, with overall job losses and increasing unemployment. Employment levels stabilized and modest job growth finally resumed in the second half of the year.

The unemployment rate in Salt Lake County peaked in January 2010 at 7.4 percent, with 42,360 residents who could not find work. Prior to the recession, in 2007, the average unemployment rate for the County was at the very low rate of 2.7 percent or 14,700 unemployed. By the advent of summer 2011, the Salt Lake County jobless rate had declined modestly to 7.0 percent with 39,750 unable to find work.

By the end of 2010, payroll jobs were increasing by 1.2 percent over the previous 12 months, with 6,657 more jobs than were recorded in December 2009. Employment opportunities were expanding in most of the major industrial sectors with the strongest job growth occurring in mining 18.2 percent, private education 6.4 percent and professional and business services 4.4 percent. Manufacturing jobs, which suffered significant losses of more than 6,500 jobs during the recession, stabilized during 2010 with a total of 50,200 jobs and an increase of 436 jobs in December 2010 compared to a year earlier.

The healthcare industry continues to add jobs, as it has done throughout the recession, although the year-over rate of growth has declined to just 0.9 percent in the fourth quarter of 2010, as the remaining effects of the recession have reduced the demand for these services.

The construction industry suffered the most significant job losses during the recession. By the end of 2010, employment in this industry has stabilized. Salt Lake County construction jobs fell from their peak levels during the housing boom by 30 percent, with average employment in 2010 of 29,743 compared to 42,492 averages in 2007.

TOOELE COUNTY

Tooele County's labor market experienced the transformation from an economy in recession to expansion during 2010. Year-over growth in jobs occurred in most industry sectors in the second-half of the year, driven by increases in the goods producing industries of mining, construction, and manufacturing.

Prior to the recession, in 2007, the average unemployment rate for Tooele County was at the low rate of 3.0 percent or 809 unemployed residents. The unemployment rate rose steadily from 3.0 percent in June of 2007, topping out at 8.5 percent at the end of 2009 with about 2,425 unemployed. The jobless rate has since receded to 7.6 percent by the spring of 2011.

As was the case along most of the Wasatch Front, year-over job growth returned to Tooele County in the last six months of 2010. In December of 2010, jobs increased by a healthy 3.0 percent compared to the previous December with construction and manufacturing leading the way adding 288 jobs. In

addition, leisure and hospitality provided 176 new jobs and professional and business services increased by 69 jobs.

Unlike most counties in Utah, construction jobs increased during 2010 in Tooele County. Construction employment had been reduced from its 2007 peak levels by 40 percent through 2009. With the addition of construction jobs in 2010, average employment for the year was 581 which is 35 percent below the 2007 average.

Unemployment Rates Wasatch Front South ESA				
	Annual Unemployment Rates			
	2007	2008	2009	2010
STATE OF UTAH	2.8%	3.7%	7.1%	7.7%
Wasatch Front South	2.7%	3.6%	6.9%	7.5%
Salt Lake County	2.7%	3.5%	6.8%	7.4%
Tooele County	3.0%	4.0%	7.7%	8.1%
Source: Utah Department of Workforce Services				

RECENT HIRING ACTIVITY

The most recent information we have for industry new hires by County, third quarter 2010, displays quite normal patterns for Salt Lake and Tooele Counties. The highest number of new hires in Salt Lake County was in **professional and business services**, which includes “temp” agencies. While these temporary jobs may seem less desirable than permanent jobs, they often do lead to more stable employment. In addition to temp agencies, business services includes high turnover industries such as janitorial and grounds keeping services.

Other Industries that display a large number of new hires are characterized by seasonal, part-time, and relatively low wage jobs that experience higher rates of turnover. Remember that a new hire indicates a person who is new to a particular employer that wasn’t with them the previous quarter.

Leisure/hospitality and **trade** are prime examples of such industries.

Finally, industries that are growing have new positions and turnover to fill, such as **private education** and **healthcare** and in the case of Tooele County **construction** and **manufacturing**.

New Hires by Industry

Wasatch Front South ESA

	Third Quarter 2010 New Hires		
	Salt Lake	Tooele	ESA
Mining	931	14	945
Construction	7,463	472	7,935
Manufacturing	4,563	193	4,756
Wholesale Trade	2,677	15	2,692
Retail Trade	10,258	247	10,505
Transportation & Warehousing	3,518	124	3,642
Utilities	63	0	63
Information	3,211	28	3,239
Financial Activities	4,492	75	4,567
Professional & Business Services	20,969	390	21,359
Education, Healthcare, Social Svcs	12,132	257	12,389
Leisure and Hospitality	10,557	421	10,978
Other Services	2,435	77	2,512
Public Administration*	1,383	51	1,434
*Unlike typical industry data, these industry groups include government employment--except federal. New hires represent employees on a firm's payroll who weren't on the payroll in the previous quarter.			
Source: Utah Department of Workforce Services.			

CURRENT INDUSTRIAL BASE

The Salt Lake County economy is the largest and most diverse in Utah. As the hub of economic activity in the state, 48 percent of all nonfarm jobs are located in the county with 37 percent of the population. With the Capitol City, many business headquarters and government agencies are located here and the county is a regional center of healthcare and financial services. The University of Utah, in addition to being the largest state government sponsored higher education institution, is a major research university. As such, the University of Utah attracts resources to the state and is an important economic driver and industry for Utah. Numerous professional, scientific, and technical businesses feed off the trained workforce and research produced at the university. Two industries that have been heavily influenced by university activities over the years are healthcare and information technology services and research.

The Tooele County economy has four industry sectors that account for more than 55 percent of the jobs in the County. Federal government defense and depot related activities provide the largest share of jobs. Second, administration support and waste disposal services with two large hazardous waste

disposal companies. Third, manufacturing activities and fourth, Tooele is a regional trucking and warehousing center.

Industry Employment as a Percent of Total Wasatch Front South				
	Share Total 2010 Nonfarm Employment			
	Salt Lake	Tooele	ESA	Statewide
Mining	0.5%	0.5%	0.5%	0.9%
Construction	5%	4%	5%	6%
Manufacturing	9%	9%	9%	9%
Wholesale Trade	5%	1%	5%	4%
Retail Trade	11%	10%	11%	12%
Transportation & Warehousing	4%	6%	4%	4%
Utilities	0.3%	0.2%	0.3%	0.3%
Information	3%	1%	3%	2%
Financial Activities	8%	2%	8%	6%
Professional & Business Services	16%	18%	16%	13%
Educational Services (Private)	2%	1%	2%	3%
Healthcare and Social Services	10%	8%	10%	10%
Leisure and Hospitality	8%	9%	8%	9%
Other Services	3%	2%	3%	3%
Government	16%	29%	16%	18%
Source: Utah Department of Workforce Services.				

FIRM SIZE

In the service area 74 percent of all 36,100 establishments employ less than 10 workers. These roughly 26,800 worksites employed 68,000 of the 580,500 total employed in the area. On the other hand, just 103 companies had 500 or more workers and 35 of these 103 each employ 1,000 or more staff.

B. DEMOGRAPHICS OF LABOR FORCE AND CUSTOMER GROUPS

This report will examine several demographic groups:

- **Labor Force**—individuals living in the area which are over the age of 16 and are considered employed or unemployed (to be considered unemployed an individual must be searching for work).
- **Nonfarm Jobs or Nonfarm Employment**—jobs are counted by place of employment rather than by residence. Also, an individual can have more than one job.
- **UI/EB Claimants**—Individuals filing a weekly claim for unemployment insurance for the week including the 12 of the month under the state unemployment program or state extended benefits program (does not include federal or military workers.)
- **DWS Intensive/Training Customers**—those customers of the Department of Workforce Services who are case-managed or are receiving training assistance.
- **DWS Assisted Customers**—those customers who received a recorded employment-related service from a DWS employee, but were not case-managed or receiving training assistance.
- **DWS Self-Directed Customers**—those customers using our online employment services only.

COMMUTER PATTERNS

The Salt Lake County economy draws commuters from all the surrounding counties in far greater numbers for work than do its residents leave the county for their jobs. About six percent of Salt Lake County workers are employed in the surrounding counties. In Tooele County, for example, 40.3 percent of their employed residents work in other Utah counties, with most traveling to Salt Lake County.

Labor Force Commuting Patterns

2005-2009

Wasatch Front ESA

	Worked in County of Residence	Worked Outside Resident County in Utah	Worked Outside of Utah
Statewide	82.3%	16.4%	1.2%
Wasatch Front South ESA	91.5%	7.6%	0.9%
Salt Lake County	93.2%	6.0%	0.7%
Tooele County	56.4%	40.3%	3.3%

Source: U.S. Census Bureau; American Community Survey.

COUNTY PATTERNS

In terms of labor force, jobs, unemployment claimants, and DWS customers in the area, Salt Lake County accounts for 95 percent of labor force and 97 percent of total jobs, with 95 percent of the area's total for claimants and 94 percent of DWS Customers. Tooele County holds 5 percent of the labor force and 3 percent of the total jobs with 5 percent of claimants and 6 percent of DWS customers.

Jobs, Labor Force, UI Claimants, and Customers Wasatch Front South ESA				
	Share of ESA Total			
	2010 Nonfarm Jobs	2005-2009 Labor Force	March 2011 UI/EB Claimants	March 2011 DWS Customers
Salt Lake County	97.3%	95.3%	94.8%	93.6%
Tooele County	2.7%	4.7%	5.2%	6.4%
Source: Utah Department of Workforce Services.				

AGE































Individuals between the ages of 25 and 34 make up the largest share of each demographic group in the Wasatch Front North ESA. They make up roughly 29 percent of the labor force, 27 percent of jobs and 29

Age of Demographic/Customer Groups Wasatch Front South ESA						
	2005-2009 Labor Force*	2009 Employ- ment	March 2011 UI/EB Claimants	March 2011 DWS Customers		
				Intensive/ Training	Assisted	Self Directed
18 and under	6%	3%	0%	2%	1%	3%
19-21	4%	6%	3%	9%	6%	9%
22-24	7%	8%	7%	10%	8%	11%
25-34	29%	27%	29%	32%	31%	32%
35-44	21%	21%	22%	22%	23%	20%
45-54	19%	20%	23%	17%	19%	16%
55-64	11%	12%	14%	8%	10%	9%
65 and Older	3%	3%	2%	1%	1%	1%
*Labor force age grouping is "19 and under" and "20-21 years."						
Source: U.S. Census Bureau and Utah Department of Workforce Services.						

percent of claimants. However, they account for an even larger share of individuals who have contact with DWS services. About 32 percent of DWS customers receiving either intensive and/or training services or self-directed services and 31 percent are assisted DWS customers. The next largest age groups of individuals are 35-44 and 45-54. These two older groups generally combined for another 40 to 42 percent of the total. The age distribution of DWS self-directed customers is skewed a little more to the younger age groups which would tend to be more comfortable using online services.

EDUCATION















































































































Educational attainment in the population in the two counties varies. Persons with a high school diploma or higher (for those persons 25 years old or older) is 89.0 percent in Salt Lake County and 92.3 percent in Tooele County. The educational attainment of unemployment claimants is different. About 58 percent of claimants have a high school diploma or higher (includes GED). Further, about 14 percent of claimants have less than a high school degree. In perspective of the three categories of DWS customers, 11 percent of the intensive/training customers had less than a HS degree but only 3-4 percent of the DWS-assisted and self-directed customers lacked HS. Overall, 56 percent of all DWS assisted customers had a high school degree. A very small percentage of claimants and DWS customers had Bachelor's Degrees, which is evidence that there is a direct relationship between educational attainment and the level of unemployment and the duration of unemployment.

Education of Demographic/Customer Groups						
Wasatch Front South ESA						
	2005-2009 Population 18-24	2005-2009 Population 25 & Older	March 2011 UI/EB Claimants	March 2011 DWS Customers		
				Intensive/ Training	Assisted	Self Directed
Less Than High School	 17%	 11%	 14%	 11%	 3%	 4%
High School	 34%	 25%	 28%	 56%	 56%	 56%
Post-Secondary, Some College	 41%	 35%	 19%	 19%	 28%	 25%
Bachelor's or Higher	 7%	 29%	 11%	 6%	 10%	 11%
Not Reported/Unkown	 0%	 0%	 28%	 7%	 3%	 4%
Source: U.S. Census Bureau and Utah Department of Workforce Services.						

OCCUPATIONS

The occupations of DWS customers shows some interesting relationships. One anomaly though is the high frequency of management occupations. This appears to be a mistake in the coding of individuals. There is wide dispersion of occupations of the DWS customers and the occupations characteristics of UI claimants. In many groups there is similarity but in others there are big differences. Notable among the differences between the proportion of DWS customers and claimants were in the management , food

prep and service, office and administrative support, construction, production, and transportation occupations.

Occupations of Demographic/Customer Groups						
Wasatch Front South ESA						
	2005-2009 Employment	March 2011 UI/EB Claimants	March 2011 DWS Customers			
			Intensive/ Training	Assisted	Self Directed	
Management	 9%	 8%	 20%	 26%	 22%	
Business/Financial	 5%	 4%	 4%	 5%	 6%	
Computer/Mathematical	 3%	 2%	 4%	 4%	 3%	
Architecture/Engineering	 2%	 2%	 2%	 3%	 2%	
Life/Physical/Social Science	 1%	 1%	 1%	 1%	 1%	
Community/Social Services	 1%	 1%	 3%	 3%	 3%	
Legal	 1%	 0%	 1%	 1%	 1%	
Education/Library	 5%	 1%	 3%	 2%	 3%	
Arts/Design/Entertainment/Sports	 2%	 1%	 3%	 3%	 4%	
Healthcare Practitioners/Technical	 4%	 2%	 5%	 3%	 3%	
Healthcare Support	 2%	 2%	 8%	 3%	 4%	
Protective Service	 2%	 1%	 3%	 4%	 3%	
Food Preparation/Serving	 4%	 3%	 14%	 8%	 7%	
Building/Grounds Cleaning	 3%	 4%	 7%	 6%	 4%	
Personal Care/Service	 3%	 1%	 2%	 1%	 1%	
Sales	 12%	 8%	 7%	 7%	 7%	
Office/Administrative Support	 17%	 17%	 8%	 8%	 12%	
Farming/Fishing/Forestry	 0%	 2%	 0%	 0%	 1%	
Construction/Extraction	 7%	 17%	 4%	 7%	 7%	
Installation/Maintenance/Repair	 3%	 5%	 1%	 2%	 2%	
Production	 6%	 10%	 1%	 1%	 2%	
Transportation /Material Moving	 6%	 8%	 1%	 2%	 1%	
Source: U.S. Census Bureau and Utah Department of Workforce Services.						

RACE AND ETHNICITY

In the service area about 25.4 percent of the population is minority. Of the 25.4 percent 16.8 percent are Hispanic. This makes Hispanics the largest minority group.

Minority Population Wasatch Front South ESA				
	Total* Population	Percent White Not Hispanic	Percent Minority	
			Not Hispanic	Hispanic
Utah Statewide	2,763,885	80.4%	6.7%	13.0%
Wasatch Front South	1,087,873	74.6%	8.7%	16.8%
Salt Lake County	1,029,655	74.0%	8.9%	17.1%
Tooele County	58,218	84.5%	4.1%	11.4%
*Total population - 2010 April 1st census count. Source: U.S. Census Bureau, 2010 Census				

POVERTY RATES

The recession has caused poverty rates to increase. The U.S. Poverty rate (2005-2009) was 13.5 percent. Utah's corresponding rate was 10.4 percent. In the Wasatch Front South service area the county rates were Salt Lake (9.3 percent) and Tooele (5.9 percent).

Poverty Rates 2005-2009 Wasatch Front South ESA			
	Poverty Rates		
	All Individuals	Children Under 18	65 and Over
Utah Statewide	10.4%	11.0%	6.8%
Wasatch Front South	9.2%	11.0%	7.5%
Salt Lake County	9.3%	11.4%	7.6%
Tooele County	5.9%	5.7%	5.4%
Source: U.S. Census Bureau, American Community Survey 2005-2009.			

C. FUTURE ECONOMIC ACTIVITY

Industry and occupational employment projections for the Wasatch South Service Area were created from the Metro Utah labor market area. This includes all of the Wasatch Front Counties because they form the basis of a large metro labor market area. People can work and live within this 50 mile radius circle around Salt Lake City. The Wasatch Front South Economy will improve this year and next. Unemployment rates will slowly decline as job prospects improve. The “recovery” will be slow because residential construction activity is still depressed. There is a lot of housing inventory that needs to be absorbed and the rates of foreclosure must subside. It will be difficult to generate a strong recovery without some significant contribution from housing.

INDUSTRY PROJECTIONS

The projections of industries for Utah spans the 2008-2018 period. In Metro-Utah the largest industries are manufacturing, retail trade, professional business services, and education and healthcare. During the

Industry Projections Wasatch Front South ESA					
	Metro Industry Projections				
	Employment		New Jobs 2008-2018	Annual Growth Rate	
	2008	2018			
Covered Agriculture/Forestry/Fishing	9,010	8,260	-750	-0.8%	
Mining	3,480	3,960	480	1.4%	
Construction	73,800	87,370	13,570	1.8%	
Manufacturing	107,170	113,480	6,310	0.6%	
Wholesale Trade	43,460	51,200	7,740	1.8%	
Retail Trade	122,480	144,970	22,490	1.8%	
Transportation and Warehousing	43,910	49,570	5,660	1.3%	
Utilities	2,430	2,720	290	1.2%	
Information	28,100	33,010	4,910	1.7%	
Financial Activities	67,050	79,670	12,620	1.9%	
Professional and Business Services	147,680	190,650	42,970	2.9%	
Educational, Health and Social Services*	194,560	262,260	67,700	3.5%	
Leisure and Hospitality	91,710	110,180	18,470	2.0%	
Other Services	32,590	36,600	4,010	1.2%	
Government*	78,480	92,870	14,390	1.8%	
Self-Employed, Unpaid Family Workers	162,230	194,700	32,470	2.0%	
* Public hospitals and education are included in the Educational/Health/Social Services industry and excluded from government. U.S. Postal Service employment is included in transportation warehousing.					
Source: Utah Department of Workforce Services					

projections period roughly 250,000 new jobs will be created in the metro area (including the Wasatch Front North, Wasatch Front South, and Mountainland service areas). The fastest growing industries will be professional and business services, healthcare, and self-employed. All industries except those in agriculture will experience growth but some, like those mentioned above, will grow faster than the 2.1 percent average for all industries. Clearly 43 percent of all 250,000 new jobs in the metro area will be in professional and business services and healthcare.

OCCUPATIONAL PROJECTIONS

The occupational projections for the metro area are available on the website but more importantly the list of those occupations for training in the Wasatch Front North are provided in the appendix to the plan. The Occupations for Training List specifies those occupations that have training potential, labor market demand, and better wages.

Occupational Projections 2008-2018 Wasatch Front South ESA			
	Metro Utah*		
	Share of Projected Job Openings	Projected Occupational Annual Growth	
Management	5%	1.5%	
Business/Financial	5%	2.8%	
Computer/Mathematical	3%	2.8%	
Architecture/Engineering	2%	1.8%	
Life/Physical/Social Science	1%	3.1%	
Community/Social Services	2%	3.0%	
Legal	1%	2.1%	
Education/Library	6%	2.8%	
Arts/Design/Entertainment/Sports	2%	2.1%	
Healthcare Practitioners/Technical	5%	3.7%	
Healthcare Support	3%	4.8%	
Protective Service	2%	2.4%	
Food Preparation/Serving	8%	2.2%	
Building/Grounds Cleaning	3%	2.1%	
Personal Care/Service	4%	2.6%	
Sales	13%	1.8%	
Office/Administrative Support	16%	1.9%	
Farming/Fishing/Forestry	0%	-0.4%	
Construction/Extraction	6%	1.9%	
Installation/Maintenance/Repair	3%	1.9%	
Production	5%	0.9%	
Transportation /Material Moving	6%	1.5%	
*Metro Utah includes Box Elder, Weber, Davis, Morgan, Tooele, Salt Lake, Summit, Juab, and Utah counties.			
Source: Utah Department of Workforce Services.			

IV. MOUNTAINLAND ECONOMIC SERVICE AREA: Utah, Summit, Wasatch, and Juab Counties

By James Robson, Economist

A. CURRENT ECONOMY

Brief Overview

The Mountainland Economic Service Area (ESA) has entered the expansion phase of economic recovery after suffering through the “great recession” of 2008/2009. Labor market conditions are on the mend with improved job, income, and business growth. Unemployment is gradually subsiding. There are still significant hangover effects from the bursting of the housing bubble and financial crises that are holding back residential construction activity, but overall renewed job growth and a gradually improving labor market will characterize economic conditions in the coming months.

Job Growth by Industry Mountainland ESA

	December 2009 to December 2010 Change in Nonfarm Jobs					
	Utah Co	Summit	Wasatch	Juab	ESA	Statewide
Total Percent Change	1.8%	4.8%	5.1%	-6.0%	2.1%	1.2%
Mining	-13	-23	6	26	-4	960
Construction	-336	-99	17	-224	-642	-903
Manufacturing	195	62	3	129	389	1,209
Wholesale Trade	-122	-2	-14	-1	-139	55
Retail Trade	-407	223	5	-43	-222	-1,666
Transportation & Warehousing	255	44	9	-7	301	1,448
Utilities	-22	-2	-2	0	-26	-32
Information	264	-4	10	-10	260	317
Financial Activities	-255	38	29	-25	-213	-1,850
Professional & Business Services	1,443	-27	119	1	1,536	6,848
Private Education	453	10	15	-9	469	1,338
Healthcare and Social Services	513	123	22	-107	551	1,336
Leisure and Hospitality	813	941	38	19	1,811	3,221
Other Services	176	22	29	-19	208	75
Government	287	-205	8	73	163	1,381

Source: Utah Department of Workforce Services.

Utah County

The negative effects of the economic recession on the Utah County labor market continued through the first half of 2010, with overall job losses and increasing unemployment. Employment levels stabilized and modest job growth finally resumed in the second half of the year.

The unemployment rate in Utah County peaked in the autumn of 2010 at 8.0 percent, with 17,800 residents who could not find work. Prior to the recession, in 2007, the average unemployment rate for the County was at the very low rate of 2.6 percent or 5,800 unemployed. By the advent of summer 2011, the Utah County jobless rate had declined to 7.2 percent with 15,900 unable to find work.

By the end of 2010, payroll jobs were increasing by 1.8 percent over the previous 12 months, with 3,244 more jobs than were recorded in December 2009. Employment opportunities were expanding in most of the major industrial sectors with the strongest growth occurring in professional and business services with 6.9 percent growth and leisure and hospitality increasing by 6.2 percent. State government jobs also increased by a healthy 5.7 percent; however this expansion occurred in higher education as the Utah Valley University continues to grow to meet the education demands of the youthful and growing population of Utah County. Private education employment with includes BYU was also growing by 2.1 percent. Manufacturing jobs, which suffered significant losses of more than 3,000 jobs during the recession, stabilized during 2010 with a total of 15,900 jobs and an increase of about 200 jobs in December 2010 compared to a year earlier.

The healthcare industry continues to add jobs, as it has done throughout the recession, although the year-over rate of growth has declined to 2.7 percent as lingering effects of the recession have reduced the demand for these services.

Construction, which suffered the most significant losses during the recession, continued to shed employment through the end of 2010. Construction employment in Utah County has been reduced from its peak levels during the housing boom by almost one-half, with average employment in 2010, 45.9 percent below the average number of construction jobs in 2007.

SUMMIT COUNTY

Summit County's labor market experienced the transformation from an economy in recession to expansion during 2010. Year-over growth in jobs occurred in most industry sectors in the second-half of the year with a surge in the job growth rate at years end, propelled by increases in healthcare and the leisure and hospitality industries.

Prior to the recession, in 2007, the average unemployment rate for Summit County was at the low rate of 2.7 percent or 579 unemployed residents. The unemployment rate rose steadily from 3.2 percent in June of 2008, topping out at 7.7 percent in the first quarter of 2010 with about 1,725 unemployed. The jobless rate has since receded to 6.2 percent by the spring of 2011.

As was the case along most of the Wasatch Front, modest year-over job growth returned to Summit County in the last six months of 2010 after suffering through a particularly difficult year in 2009. In December of 2010, jobs increased by a robust 4.8 percent compared to the previous December with leisure and hospitality adding 941 jobs. Very favorable weather conditions had set the stage for a much needed boost from the ski industry. In addition, the healthcare, trade, and transportation (trucking) industries had also seen significant employment increases. Another bright spot for the Summit economy was increases in manufacturing with 62 new jobs in December 2010 or 10 percent above a year ago.

Construction continued to lose jobs through the end of 2010. Construction employment in Summit County has been reduced from its peak levels in 2007 by 48.3 percent, with average employment in 2010 of 1,336 jobs. Another employment drag has been the loss of 199 local government jobs spread among county, municipal, and public education from December 2009 to December 2010.

WASATCH COUNTY

Just like other counties in the Mountainland area, Wasatch County's labor market experienced the transformation from recession to expansion during 2010. Unlike other counties in the region, year-over growth in jobs occurred in **all** major industry sectors but one from December 2009 to December 2010. The one exception was trade, transportation, and utilities which loss just 2 jobs. The County overall year-end job growth rate was 5.1 percent

Prior to the recession, in 2007, the average unemployment rate for Wasatch County was at the low rate of 2.7 percent or 291 unemployed residents. The unemployment rate rose during the recession to a high of 9.4 percent by February 2010, with 948 people unable to find work. The jobless rate has since declined to 8.2 percent by the spring of 2011.

As was the case elsewhere, year-over job growth returned to Wasatch County in the last six months of 2010 after suffering widespread losses in 2009. In December of 2010, jobs increased by 296, a strong 5.1 percent compared to the previous December. Professional and business services lead the way, growing by 26.6 percent or 119 new jobs.

Construction added 22 jobs in the final quarter of 2010, increasing by 2.9 percent compared to 2009. Construction employment in Wasatch County has been reduced from its peak levels in 2007 by 44.1 percent, with average employment in 2010 of 691 jobs.

JUAB COUNTY

























During 2010, the Juab County labor market exhibited a very different pattern than was seen elsewhere in the Mountainland region and along the Wasatch Front. Total nonfarm employment returned close to levels seen in 2005. In 2010, average nonfarm jobs totaled 3,138 compared to 3,094 in 2005. Two forces have had a major impact on Juab County's economy in the intervening years; first, the construction of

the Current Creek Power Plant in Mona from 2006 through 2007, and second, the national and state recession.

The construction of the power plant had a large positive impact on jobs, incomes and economic activity. This activity provided considerable economic momentum in 2008 and blunted some of the recessionary impacts of 2009. Therefore, 2010 saw continued overall employment declines instead of the beginnings of renewed job growth experienced in other counties of the region.

Prior to the recession, in 2007, the average unemployment rate for Summit County was at the low rate of 3.4 percent or 139 unemployed residents. The unemployment rate rose steadily reaching a high of 10.8 percent by the fall of 2010, with an estimated 433 jobless workers. By the spring of 2011 the unemployment rate had declines somewhat to 10.5 percent.

In December 2010, total nonfarm jobs were down by 197 or a drop of six percent compared to December 2009. Industry bright spots were 129 new manufacturing jobs and 84 local government jobs. The largest job losses were recorded by construction (-224), healthcare (-107) and trade and transportation (-51).

Unemployment Rates Mountainland ESA				
	Annual Unemployment Rates			
	2007	2008	2009	2010
Utah Statewide	 2.8%	 3.7%	 7.1%	 7.7%
Mountainland	 2.6%	 3.7%	 6.9%	 7.8%
Utah County	 2.6%	 3.7%	 6.8%	 7.7%
Summit County	 2.7%	 3.5%	 6.8%	 7.5%
Wasatch County	 2.7%	 3.9%	 8.1%	 9.2%
Juab County	 3.4%	 5.7%	 9.7%	 10.5%
Source: Utah Department of Workforce Services				

RECENT HIRING ACTIVITY

The most recent information we have for industry new hires by County, third quarter 2010, displays quite normal patterns for each county in the Mountainland region. The highest number of new hires in Utah County was in **professional and business services**, which includes “temp” agencies. While these temporary jobs may seem less desirable than permanent jobs, they often do lead to more stable employment. In addition to temp agencies, business services include high turnover industries such as janitorial and grounds keeping services.

Other Industries that display a large number of new hires are characterized by seasonal, part-time, and relatively low wage jobs that experience higher rates of turnover. Remember that a new hire indicates a person who is new to a particular employer that wasn't with them the previous quarter.

Leisure/hospitality and **trade** are prime examples of such industries.

Finally, industries that are growing have new positions and turnover to fill, such as **private education** and **healthcare**.

New Hires by Industry*

Mountainland ESA

	Third Quarter 2010 New Hires				
	Utah Co	Summit	Wasatch	Juab	ESA
Covered Agriculture/Forestry/Fishing	600	19	11	4	634
Mining	43	7	5	NA	55
Construction	2,611	606	189	41	3,447
Manufacturing	1,795	61	44	100	2,000
Wholesale Trade	453	32	5	NA	490
Retail Trade	4,086	568	134	72	4,860
Transportation & Warehousing	402	44	36	10	492
Utilities	11	3	NA	0	14
Information	994	24	14	0	1,032
Financial Activities	896	189	94	NA	340
Professional & Business Services	7,145	259	115	12	7,531
Education, Healthcare, Social Svcs	5,290	234	110	60	5,694
Leisure and Hospitality	4,138	1,314	510	88	6,050
Other Services	972	183	35	4	1,194
Public Administration*	421	38	13	7	479

*Unlike typical industry data, these industry groups include government employment--except federal. New hires represent employees on a firm's payroll who weren't on the payroll in the previous quarter.

Source: Utah Department of Workforce Services.

CURRENT INDUSTRIAL BASE

In the Mountainland ESA, a little more than 85 percent of all jobs are located within Utah County. Education activities—private higher education, state higher education and public K-12 education—account for one in Utah County. BYU a major private research university and UVU a state government university are important economic drivers for the ESA. Numerous professional, scientific, and technical businesses out of every 5 jobs feed off of the trained workforce and research produced by these institutions.

Retail trade, leisure/hospitality and healthcare industries each contribute from 10 to 13 percent of jobs within the ESA.

Industry Employment Distribution							
Mountainland ESA							
	Share of 2010 Nonfarm Employment by Industry						
	Utah Co	Summit	Wasatch	Juab	ESA	Statewide	
Mining	0.0%	0.3%	1.0%	2.3%	0.1%	0.9%	
Construction	6%	6%	12%	10%	6%	6%	
Manufacturing	9%	3%	3%	20%	8%	9%	
Wholesale Trade	3%	1%	2%	1%	3%	4%	
Retail Trade	12%	15%	12%	9%	13%	12%	
Transportation & Warehousing	1%	2%	1%	1%	1%	4%	
Utilities	0.2%	0.2%	0.4%	0.6%	0.2%	0.3%	
Information	5%	1%	2%	1%	4%	2%	
Financial Activities	3%	7%	5%	2%	4%	6%	
Professional & Business Services	12%	7%	8%	5%	12%	13%	
Educational Services (Private)	12%	2%	1%	1%	11%	3%	
Healthcare and Social Services	11%	4%	8%	14%	10%	10%	
Leisure and Hospitality	8%	36%	19%	9%	11%	9%	
Other Services	2%	3%	3%	1%	2%	3%	
Government	15%	12%	21%	24%	15%	18%	
Source: Utah Department of Workforce Services.							

FIRM SIZE

In the Mountainland ESA, roughly 77 percent of firms in the area had fewer than 10 employees in the first quarter of 2010. On the other hand, 58 percent of all jobs are with the 5 percent of firms that have 50 or more employees.

B. DEMOGRAPHICS OF LABOR FORCE AND CUSTOMER GROUPS

This report will examine several demographic groups:

- **Labor Force**—individuals living in the area which are over the age of 16 and are considered employed or unemployed (to be considered unemployed an individual must be searching for work).
- **Nonfarm Jobs or Nonfarm Employment**—jobs are counted by place of employment rather than by residence. Also, an individual can have more than one job.
- **UI/EB Claimants**—Individuals filing a weekly claim for unemployment insurance for the week including the 12 of the month under the state unemployment program or state extended benefits program (does not include federal or military workers.)
- **DWS Intensive/Training Customers**—those customers of the Department of Workforce Services who are case-managed or are receiving training assistance.
- **DWS Assisted Customers**—those customers who received a recorded employment-related service from a DWS employee, but were not case-managed or receiving training assistance.
- **DWS Self-Directed Customers**—those customers using our online employment services only.

COMMUTER PATTERNS

Data from the American Community Survey indicates that more than 18 percent of all workers in the Mountainland ESA commute outside their resident county for employment purposes. Wasatch County workers show the highest percentage of commuting at 44 percent, working in Summit, Salt Lake, and Utah Counties. Almost 40 percent of Juab County workers commute—mostly to Utah County.

Labor Force Commuting Patterns 2005-2009 Mountainland ESA			
	Worked in County of Residence	Outside Resident County in Utah	Worked Outside of Utah
Statewide	82.3%	16.4%	1.2%
Mountainland ESA	80.8%	17.9%	1.2%
Utah County	83.2%	15.7%	1.1%
Summit County	71.5%	25.1%	3.4%
Wasatch County	55.0%	44.2%	0.8%
Juab County	58.1%	39.6%	2.3%
Source: U.S. Census Bureau; American Community Survey.			

COUNTY PATTERNS

With 88 percent of the population, Utah County dominates the Mountainland ESA regardless of demographic group. Utah County has 86 percent of the ESA labor force and 85.5 percent of nonfarm jobs.

















































DWS intensive/training customers comprise only 9 percent of the total customer base in the Mountainland ESA. DWS self-directed customers are the largest share—54 percent, with the remaining 37 percent as DWS-assisted customers.

Jobs, Labor Force, UI Claimants, and Customers Mountainland ESA				
	Share of ESA Total			
	2010 Nonfarm Jobs	2005-2009 Labor Force	March 2011 UI/EB Claimants	March 2011 DWS Customers
Utah County	85.5%	87.0%	85.6%	90.0%
Summit County	10.1%	7.5%	6.3%	4.4%
Wasatch County	2.9%	3.9%	5.0%	3.4%
Juab County	1.5%	1.6%	3.1%	2.2%
Source: Utah Department of Workforce Services.				

AGE

Utah County has with its many college students, young and large families, has the youngest population of any county in the State with a median age of 23.2 (the state median—28.5).

Individuals between the ages of 25 and 34 make up the largest segment of each demographic group in the Mountainland ESA. Both very old and very young workers are less likely to be DWS customers than their share of the total labor force would suggest. Interestingly, age does not seem to be a barrier when

Age of Demographic/Customer Groups Mountainland ESA						
	2005-2009 Labor Force*	2009 Employ- ment	March 2011 UI/EB Claimants	March 2011 DWS Customers		
				Intensive/ Training	Assisted	Self Directed
18 and under	 9%	 5%	 0%	 5%	 2%	 3%
19-21	 9%	 8%	 3%	 10%	 9%	 9%
22-24	 14%	 10%	 7%	 10%	 11%	 12%
25-34	 20%	 28%	 30%	 34%	 34%	 33%
35-44	 19%	 20%	 22%	 23%	 20%	 20%
45-54	 16%	 17%	 22%	 13%	 15%	 14%
55-64	 9%	 10%	 13%	 5%	 8%	 8%
65 and Older	 2%	 3%	 3%	 0%	 1%	 1%
*Labor force age grouping is "19 and under" and "20-21 years."						
Source: U.S. Census Bureau and Utah Department of Workforce Services.						

it comes to the use of the DWS online job-matching service.

EDUCATION

In the general population, individuals living in the Mountainland ESA have higher levels of educational attainment than any other region of the state.

Among DWS customers, the largest share of individuals report obtaining at least a high school diploma or GED. The portion of customers with at least some post-secondary training is still substantial. About 12 percent of intensive customers have less than a high school degree—compared to 7 percent of the general population. Individuals that have attained a bachelor's degrees or higher are the least likely to be DWS customers.

Education of Demographic/Customer Groups








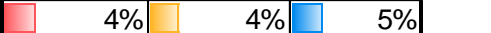
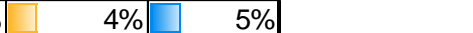


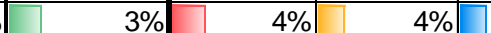
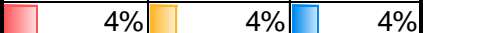
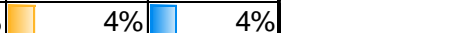



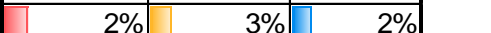
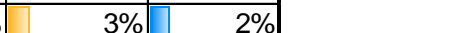



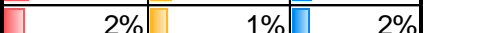
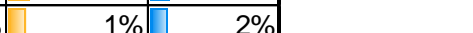

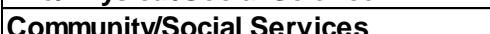
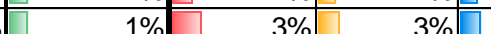
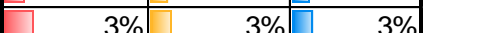
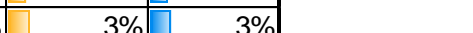

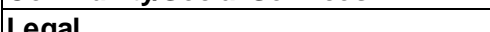
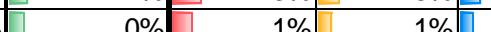
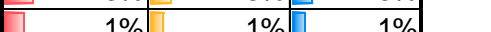
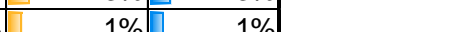


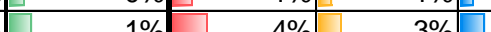
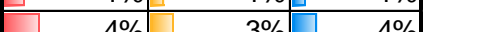
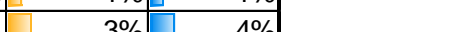

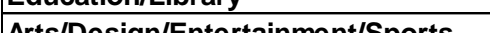

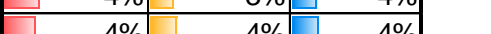
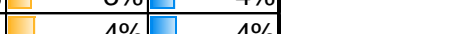

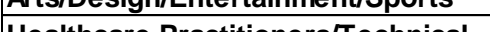

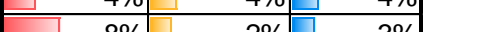
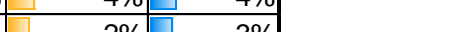

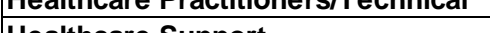

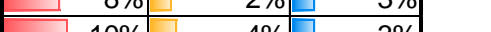
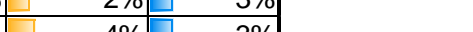

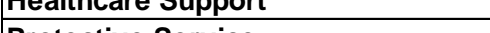

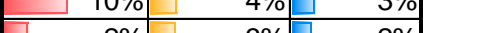
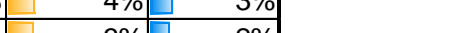

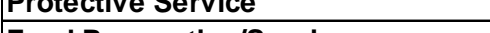

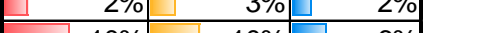
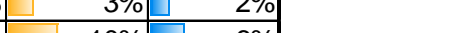

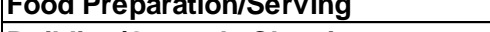

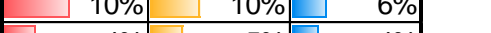
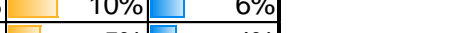

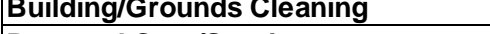
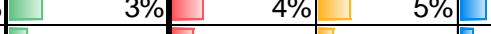
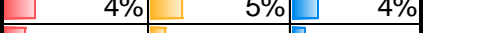
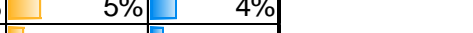


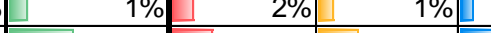
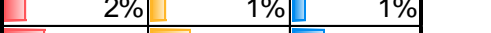
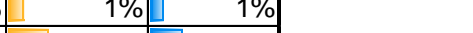



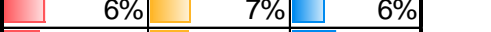
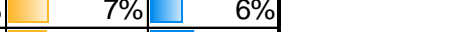



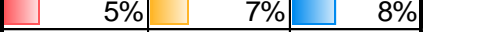
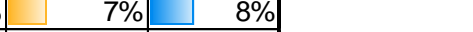



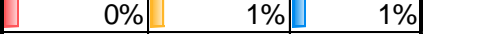
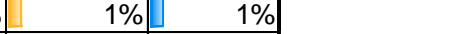








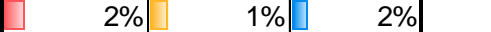
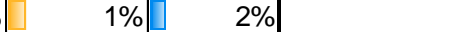



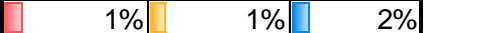
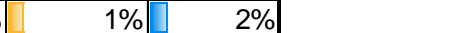

Mountainland ESA

	2005-2009 Population 18-24	2005-2009 Population 25 & Older	March 2011 UI/EB Claimants	March 2011 DWS Customers		
				Intensive/ Training	Assisted	Self Directed
Less Than High School	9%	7%	12%	12%	3%	4%
High School	24%	20%	25%	55%	55%	48%
Post-Secondary, Some College	61%	38%	21%	23%	29%	28%
Bachelor's or Higher	6%	35%	16%	6%	9%	16%
Not Reported/Unkown	0%	0%	27%	4%	3%	4%

Source: U.S. Census Bureau and Utah Department of Workforce Services.

OCCUPATIONS

While only 10 percent of the Mountainland ESA's labor force is employed in a managerial position, DWS customers are more than twice as likely to present themselves as looking for management-level jobs--probably they don't understand the occupational coding structure. Intensive/training DWS customers display relatively high shares of food preparation/serving occupations and healthcare support occupations.

Occupations of Demographic/Customer Groups Mountainland ESA					
	2005-2009 Employment	March 2011 UI/EB Claimants	March 2011 DWS Customers		
			Intensive/ Training	Assisted	Self Directed
Management	 10%	 10%	 22%	 28%	 26%
Business/Financial	 4%	 3%	 4%	 4%	 5%
Computer/Mathematical	 4%	 3%	 4%	 4%	 4%
Architecture/Engineering	 2%	 2%	 2%	 3%	 2%
Life/Physical/Social Science	 1%	 1%	 2%	 1%	 2%
Community/Social Services	 1%	 1%	 3%	 3%	 3%
Legal	 1%	 0%	 1%	 1%	 1%
Education/Library	 8%	 1%	 4%	 3%	 4%
Arts/Design/Entertainment/Sports	 2%	 2%	 4%	 4%	 4%
Healthcare Practitioners/Technical	 4%	 2%	 8%	 2%	 3%
Healthcare Support	 2%	 1%	 10%	 4%	 3%
Protective Service	 2%	 1%	 2%	 3%	 2%
Food Preparation/Serving	 5%	 3%	 10%	 10%	 6%
Building/Grounds Cleaning	 4%	 3%	 4%	 5%	 4%
Personal Care/Service	 3%	 1%	 2%	 1%	 1%
Sales	 13%	 8%	 6%	 7%	 6%
Office/Administrative Support	 16%	 14%	 5%	 7%	 8%
Farming/Fishing/Forestry	 0%	 2%	 0%	 1%	 1%
Construction/Extraction	 6%	 20%	 4%	 7%	 8%
Installation/Maintenance/Repair	 3%	 5%	 2%	 1%	 2%
Production	 6%	 8%	 1%	 1%	 2%
Transportation /Material Moving	 4%	 8%	 0%	 2%	 1%
Source: U.S. Census Bureau and Utah Department of Workforce Services.					

RACE AND ETHNICITY

Nationally, 36 percent of the population belongs to an ethnic or racial minority. In the Mountainland ESA, 15.6 percent of residents are members of an ethnic/racial minority. The Hispanic/Latino ethnic group is the largest minority group at 10.8 percent.

Minority Population Mountainland ESA				
	Total* Population	Percent White Not Hispanic	Percent Minority	
			Not Hispanic	Hispanic
Utah Statewide	2,763,885	80.4%	6.7%	13.0%
Mountainland	586,664	84.4%	4.8%	10.8%
Utah County	516,564	84.2%	5.0%	10.8%
Summit County	36,324	85.4%	3.1%	11.5%
Wasatch County	23,530	84.2%	2.2%	13.5%
Juab County	10,246	94.0%	2.3%	3.7%
*Total population - 2010 April 1st census count. Source: U.S. Census Bureau, 2010 Census				

POVERTY RATES

All counties in the Mountainland ESA— Utah, Summit, Wasatch, and Juab—displayed lower poverty rates than the national average. Utah County has a higher rate of poverty at 13.1 percent compared to the state average at 10.4 percent. This higher than expected rate is due to the many college student households with little income.

Poverty Rates 2005-2009 Mountainland ESA			
	Poverty Rates		
	All Individuals	Children Under 18	65 and Over
Utah Statewide	10.4%	11.0%	6.8%
Mountainland ESA	12.5%	9.1%	5.5%
Utah County	13.1%	9.2%	5.4%
Summit County	7.0%	7.0%	4.8%
Wasatch County	7.8%	9.2%	2.3%
Juab County	10.8%	10.5%	16.9%
Source: U.S. Census Bureau, American Community Survey 2005-2009.			

C. FUTURE ECONOMIC ACTIVITY

New job growth and a gradually improving labor market will characterize economic conditions in the coming year. The improving economy should slowly bring down the jobless rate. Hangover effects from the bursting of the housing bubble and high gasoline prices will moderate the pace of expansion.

INDUSTRY PROJECTIONS

The need to educate our children and train the workforce coupled with increasing demand for medical services cause the education and healthcare industries to generate the largest number jobs in the upcoming decade. Employment projections to 2018 indicate that self-employment, leisure/hospitality services, retail trade, construction (in the not too distant future), and noneducational government should contribute substantial jobs to the labor market.

Industry Projections Mountainland ESA













































	Metro Industry Projections			
	Employment		New Jobs 2008-2018	Annual Growth Rate
	2008	2018		
Covered Agriculture/Forestry/Fishing	9,010	8,260	-750	-0.8%
Mining	3,480	3,960	480	1.4%
Construction	73,800	87,370	13,570	1.8%
Manufacturing	107,170	113,480	6,310	0.6%
Wholesale Trade	43,460	51,200	7,740	1.8%
Retail Trade	122,480	144,970	22,490	1.8%
Transportation and Warehousing	43,910	49,570	5,660	1.3%
Utilities	2,430	2,720	290	1.2%
Information	28,100	33,010	4,910	1.7%
Financial Activities	67,050	79,670	12,620	1.9%
Professional and Business Services	147,680	190,650	42,970	2.9%
Educational, Health and Social Services*	194,560	262,260	67,700	3.5%
Leisure and Hospitality	91,710	110,180	18,470	2.0%
Other Services	32,590	36,600	4,010	1.2%
Government*	78,480	92,870	14,390	1.8%
Self-Employed, Unpaid Family Workers	162,230	194,700	32,470	2.0%

* Public hospitals and education are included in the Educational/Health/Social Services industry and excluded from government. U.S. Postal Service employment is included in transportation warehousing.

Source: Utah Department of Workforce Services

OCCUPATIONAL PROJECTIONS

The four major occupational groups expected to produce the most new openings to 2018 are: office/administrative support, food/preparation and serving, sales, and construction/extraction.

Occupational Projections 2008-2018			
Mountainland ESA			
	Metro* Utah		
	Share of Projected Job Openings	Projected Occupational Annual Growth	
Management	 5%	 1.5%	
Business/Financial	 5%	 2.8%	
Computer/Mathematical	 3%	 2.8%	
Architecture/Engineering	 2%	 1.8%	
Life/Physical/Social Science	 1%	 3.1%	
Community/Social Services	 2%	 3.0%	
Legal	 1%	 2.1%	
Education/Library	 6%	 2.8%	
Arts/Design/Entertainment/Sports	 2%	 2.1%	
Healthcare Practitioners/Technical	 5%	 3.7%	
Healthcare Support	 3%	 4.8%	
Protective Service	 2%	 2.4%	
Food Preparation/Serving	 8%	 2.2%	
Building/Grounds Cleaning	 3%	 2.1%	
Personal Care/Service	 4%	 2.6%	
Sales	 13%	 1.8%	
Office/Administrative Support	 16%	 1.9%	
Farming/Fishing/Forestry	 0%	 -0.4%	
Construction/Extraction	 6%	 1.9%	
Installation/Maintenance/Repair	 3%	 1.9%	
Production	 5%	 0.9%	
Transportation /Material Moving	 6%	 1.5%	
<p>*Metro Utah includes Box Elder, Weber, Davis, Morgan, Tooele, Salt Lake, Summit, Juab, and Utah counties.</p> <p>Source: Utah Department of Workforce Services.</p>			

V. UINTAH BASIN ECONOMIC SERVICE AREA: Daggett, Duchesne, and Uintah Counties

By John Mathews, Economist

A. CURRENT ECONOMY

Brief Overview

In 2010 the ESA's economy struggled to hold its own, compared to 2009. As a whole, the ESA lost some 430 jobs in 2010, down 2.0 percent from 2009. Duchesne was responsible for almost all the job declines dropping over 400 positions (5.6 percent). Uintah County lost just a handful of positions (20) and Daggett actually added about 20 to payrolls in 2010. The service area is still feeling the sting of the recession as unemployment averaged 7.5 percent in 2010 which was just below the state average of 7.7 percent. Daggett's jobless rate in 2010 was 7.0 percent with Duchesne at 8.0 percent and Uintah in between at 7.2 percent. Just two years ago in 2008 rates for the three counties were all below 4.0 percent. Into March of 2011 the unemployment rate for Daggett was 6.5 percent, Duchesne at 6.3 percent and Uintah was 5.7 percent. This is an improvement in the rate for each county from March of 2010. The graph on job change below shows the most current month (December) year-over change. For unemployment, the annual averages are shown in that graph.

Construction activity in the ESA in 2010 showed mixed results. Daggett County had fewer permits and valuation than last year. Duchesne County permits were off 32 percent but did have some nonresidential activity that buoyed the total valuation level raising it up by 24 percent from 2009. Uintah County increased its permits by about 20 percent, but total valuation was off by 27 percent. Consumer spending increased in Daggett and Uintah counties by about five percent between the fourth quarter of 2009 and fourth quarter of 2010. Duchesne County, on the other hand, increased spending by 36 percent in the year-over comparison. The Uintah Basin's economy is dependent on the forces at play in the energy industry. In the middle of the first decade the area was cooking. Currently, it will be a wait and see posture as the industry moves forward.

Job Growth by Industry Uintah Basin ESA

	Dec 2009 to Dec 2010 Change in Nonfarm Jobs			
	Daggett	Duchesne	Uintah	ESA
Total Percent Change	0.8%	3.4%	7.2%	5.7%
Mining	0	305	388	693
Construction	7	-250	183	-60
Manufacturing	-1	47	22	68
Wholesale Trade	-2	22	14	34
Retail Trade	-2	5	-91	-88
Transportation & Warehousing	1	96	126	223
Utilities	0	7	-7	0
Information	0	-7	1	-6
Financial Activities	0	-22	124	102
Professional & Business Services	-6	20	65	79
Private Education	0	-10	4	-6
Healthcare and Social Services	0	-23	-17	-40
Leisure and Hospitality	-14	-10	47	23
Other Services	1	10	62	73
Government	19	59	14	92

Source: Utah Department of Workforce Services.

DAGGETT COUNTY

The County added about 20 jobs to its payrolls in 2010. A few were in construction but over half were in local government positions. Unemployment in March 2011 was reported at 6.5 percent, down slightly from the 6.9 percent of a year ago. Spending in 2010 was up by five percent but building activity fell during the year. Prospects are more of the same in this recreation/tourism-related county.

DUCHESNE COUNTY

During 2010 virtually all the job losses in the ESA happened in Duchesne County. About 435 positions were dropped and 300 of those were in construction. Transportation and retail trade also lost jobs by 80 and 50 respectively. Industry sectors adding jobs were professional and business services, and in government (federal and local). By the end of 2010 (December), construction was still shedding jobs (250) but most of the other sectors including trade and transportation had added employment back to their payrolls. The current unemployment rate (March 2011) is 6.3, down from the 8.8 percent rate just a year ago. The economy appears to be improving into 2011.

UINTAH COUNTY

Job growth in 2010 was down from 2009 but by less than 20 jobs when comparing the annual data. Nonfarm jobs stayed at about the 13,300 level between the two years. The only significant decline in jobs during the year was in trade, transportation, and utilities. That was off by 200 jobs. Most other sectors including construction and government increased employment, offsetting the 200 drop. By the end of December 2010 job counts were up by nearly 900 positions with mining and construction leading the way, adding 370 and 180 jobs, respectively. Transportation and finance also contributed to the increase. Other good news for the county was the decline in the unemployment rate from 8.1 in March 2010 to 5.7 percent in March of 2011.

Note: In this expanded analysis additional text and graphs have been added to aid the reader in understanding the economies of the service area.

Unemployment Rates Uintah Basin ESA				
	Annual Unemployment Rates			
	2007	2008	2009	2010
Utah Statewide	2.8%	3.7%	7.1%	7.7%
Uintah Basin ESA	2.3%	2.6%	8.1%	7.5%
Daggett County	3.7%	4.1%	5.6%	7.0%
Duchesne County	2.4%	2.8%	8.3%	8.0%
Uintah County	2.2%	2.4%	8.1%	7.2%
Source: Utah Department of Workforce Services				

RECENT HIRING ACTIVITY

Most hiring activity occurred in the industry sectors where most of the employment is. During the period data is available (third quarter 2010) new hires were concentrated in mining (881), construction (521), retail trade (449), and hospitality (689). Just about 4,000 new hires took place during this period. Over 1,330 of these were in Duchesne County and 2,670 occurred in Uintah County.

New Hires by Industry*				
Uintah Basin ESA				
	Third Quarter 2010 New Hires			
	Daggett	Duchesne	Uintah	ESA
Agriculture (covered)	-	N/A	18	18
Mining	-	285	596	881
Construction	4	245	272	521
Manufacturing	N/A	49	39	88
Wholesale Trade	-	24	67	91
Retail Trade	4	153	292	449
Transportation & Warehousing	-	106	221	327
Utilities	-	4	4	8
Information	-	8	7	15
Financial Activities	-	24	108	132
Professional & Business Services	-	22	169	128
Education, Healthcare, Social Svcs	-	177	159	336
Leisure and Hospitality	37	172	480	689
Other Services	-	34	110	144
Public Administration*	4	26	124	154
*Unlike typical industry data, these industry groups include government employment--except federal. New hires represent employees on a firm's payroll who weren't on the payroll in the previous quarter. Source: Utah Department of Workforce Services.				

CURRENT INDUSTRIAL BASE

Three of the 11 major industry sectors in the service area account for 67 percent of all jobs. Mining accounts for 20 percent, or 4,140, of the 21,000 jobs total. Trade, transportation, and utilities had 4,780, or 23 percent of the total, and government added another 24 percent, or 5,020, of all jobs.

Industry Employment Distribution Uintah Basin ESA					
	Share of 2010 Nonfarm Employment by Industry				
	Daggett	Duchesne	Uintah	ESA	Statewide
Mining	0.2%	20.6%	19.8%	19.7%	0.9%
Construction	3%	7%	7%	7%	6%
Manufacturing	1%	2%	1%	2%	9%
Trade, Transportation, Utilities	8%	23%	23%	23%	19%
Information	0%	3%	1%	2%	2%
Financial Activities	0%	2%	4%	3%	6%
Professional & Business Services	0.3%	2.8%	5.1%	4.2%	12.9%
Education, Health, & Social Svcs	0%	5%	7%	6%	13%
Leisure and Hospitality	29%	5%	7%	7%	9%
Other Services	0%	3%	3%	3%	3%
Government	58%	26%	21%	24%	18%

Source: Utah Department of Workforce Services.

FIRM SIZE

In the service area 75 percent of all 2,050 establishments employ less than 10 workers. These roughly 1,540 worksites employed 4,140 (20 percent) of the 20,260 total employed in the area. On the other hand, just 4 companies had 250 or more workers and accounted for 7 percent of all the employment in the ESA.

B. DEMOGRAPHICS OF LABOR FORCE AND CUSTOMER GROUPS

This report will examine several demographic groups:

- **Labor Force**—individuals living in the area which are over the age of 16 and are considered employed or unemployed (to be considered unemployed an individual must be searching for work).

- **Nonfarm Jobs or Nonfarm Employment**—jobs are counted by place of employment rather than by residence. Also, an individual can have more than one job.
- **UI/EB Claimants**—Individuals filing a weekly claim for unemployment insurance for the week including the 12 of the month under the state unemployment program or state extended benefits program (does not include federal or military workers.)
- **DWS Intensive/Training Customers**—those customers of the Department of Workforce Services who are case-managed or are receiving training assistance.
- **DWS Assisted Customers**—those customers who received a recorded employment-related service from a DWS employee, but were not case-managed or receiving training assistance.
- **DWS Self-Directed Customers**—those customers using our online employment services only.

COMMUTER PATTERNS

Commuting in the service area reflects that most people who live in the county work in the county. In Daggett and Duchesne counties about 85 percent of workers who reside there also work there. In Uintah County that number rises to 89.6 percent.

Labor Force Commuting Patterns 2005-2009 Uintah Basin ESA			
	Worked in County of Residence	Outside Resident County in Utah	Worked Outside of Utah
Statewide	82.3%	16.4%	1.2%
Uintah Basin ESA	87.8%	10.1%	2.1%
Carbon County	85.8%	4.7%	9.4%
Emery County	84.5%	14.4%	1.2%
Uintah County	89.6%	8.1%	2.4%
Source: U.S. Census Bureau; American Community Survey.			

COUNTY PATTERNS

















































In terms of labor force, jobs, unemployment claimants, and DWS customers in the ESA, Uintah County accounts for 63 percent of the ESA's labor force and also 63 percent of total jobs. Uintah also claims 58 percent of all ESA claimants and 65 percent of all DWS Customers. Duchesne County makes up 36 percent of the labor force and 35 percent of the total employed and 39 percent of all ESA claimants and 34 percent of DWS Customers. Daggett County's share of the total in all categories is one to three percent. Having the same percent distribution of population, labor force, employed, claimants, and DWS customers is unique. Homogeneity in these characteristics reflects the similarity of the region's counties.

Jobs, Labor Force, UI Claimants, and Customers Uintah Basin ESA				
	Share of ESA Total			
	2010 Nonfarm Jobs	2005-2009 Labor Force	March 2011 UI/EB Claimants	March 2011 DWS Customers
Daggett County	1.8%	1.8%	3.0%	1.0%
Duchesne County	35.3%	35.5%	39.0%	34.0%
Uintah County	63.0%	62.8%	58.0%	65.0%
Source: Utah Department of Workforce Services.				

AGE

Individuals between the ages of 25 and 34 make up the largest share of employment and DWS customers (DWS self-directed customers, DWS assisted customers, and DWS intensive/training customers). They make up over one-fourth of both jobs and the labor force. This age group accounts for 25 percent of DWS self-directed customers, a third of DWS intensive/training customers, and 32 percent of DWS assisted customers. Unemployment insurance claimants are more prevalent in the 45-54 age cohort where they hold a 26 percent share of total claimants. There are still a significant number – 23 percent of claimants in the 25-34 age group. Claimants in the ESA are older than the DWS assisted customers.

Age of Demographic/Customer Groups Uintah Basin ESA

	2005-2009 Labor Force*	2009 Employ- ment	March 2011 UI/EB Claimants	March 2011 DWS Customers		
				Intensive/ Training	Assisted	Self Directed
18 and under	 9%	 5%	 0%	 7%	 2%	 9%
19-21	 5%	 6%	 7%	 14%	 11%	 16%
22-24	 8%	 7%	 7%	 16%	 11%	 12%
25-34	 23%	 27%	 23%	 33%	 32%	 26%
35-44	 18%	 20%	 18%	 18%	 21%	 15%
45-54	 22%	 20%	 26%	 10%	 15%	 14%
55-64	 13%	 12%	 15%	 2%	 6%	 7%
65 and Older	 3%	 3%	 3%	 0%	 1%	 1%

*Labor force age grouping is "19 and under" and "20-21 years."

Source: U.S. Census Bureau and Utah Department of Workforce Services.

EDUCATION

Educational attainment in the population in the three counties is very similar. About 83 percent to 85 percent of persons in each of the three counties have a high school diploma or higher (for those persons 25 years old or older). The educational attainment of unemployment claimants is different. About 54 percent of claimants have a high school diploma or higher (includes GED), and 18 percent of claimants have less than a high school degree. For DWS customers (not claimants) 88 percent have a high school degree or higher. For intensive/training DWS customers that percentage was 76, for DWS assisted 91 percent and for DWS self-directed it was 86 percent. About five percent of claimants and three percent of DWS customers have Bachelor's Degrees, which is evidence that there is a direct relationship between educational attainment and the level of unemployment and the duration of unemployment.

Education of Demographic/Customer Groups						
Uintah Basin ESA						
	2005-2009 Population 18-24	2005-2009 Population 25 & Older	March 2011 UI/EB Claimants	March 2011 DWS Customers		
				Intensive/ Training	Assisted	Self Directed
Less Than High School	15%	15%	18%	18%	8%	11%
High School	36%	37%	35%	62%	69%	63%
Post-Secondary, Some College	35%	34%	14%	13%	19%	17%
Bachelor's or Higher	14%	14%	5%	2%	2%	5%
Not Reported/Unkown	0%	0%	27%	6%	2%	4%
Source: U.S. Census Bureau and Utah Department of Workforce Services.						

OCCUPATIONS

The occupations of DWS customers show some interesting relationships. One anomaly though is the high percentage of total customers (about 20 percent) in management occupations. This appears to be a mistake in the coding of individuals. There is wide dispersion of the concentration of the occupations DWS customers and the occupations of UI claimants. In many groups there is similarity, but in others there are big differences. Notable among the differences between the proportion of DWS customers and claimants are in the management, food preparation and service, office and administrative support, construction/mining, production, and transportation occupations. Construction/mining occupations claim 25 percent of all claimants but only about 10-13 percent of DWS customers.

Occupations of Demographic/Customer Groups					
Utah Basin ESA					
	2005-2009 Employment	March 2011 UI/EB Claimants	March 2011 DWS Customers		
			Intensive/ Training	Assisted	Self Directed
Management	8%	4%	19%	18%	23%
Business/Financial	2%	1%	5%	4%	5%
Computer/Mathematical	1%	0%	2%	2%	3%
Architecture/Engineering	1%	2%	2%	3%	2%
Life/Physical/Social Science	2%	1%	0%	2%	2%
Community/Social Services	1%	0%	2%	2%	3%
Legal	1%	0%	1%	0%	1%
Education/Library	5%	1%	3%	4%	3%
Arts/Design/Entertainment/Sports	1%	0%	2%	3%	4%
Healthcare Practitioners/Technical	3%	2%	6%	2%	3%
Healthcare Support	2%	1%	12%	4%	4%
Protective Service	2%	2%	2%	4%	3%
Food Preparation/Serving	5%	4%	25%	14%	8%
Building/Grounds Cleaning	4%	3%	5%	5%	4%
Personal Care/Service	3%	1%	1%	2%	1%
Sales	11%	8%	3%	7%	7%
Office/Administrative Support	13%	10%	3%	7%	10%
Farming/Fishing/Forestry	1%	3%	1%	3%	1%
Construction/Extraction	13%	25%	6%	11%	8%
Installation/Maintenance/Repair	6%	3%	1%	2%	2%
Production	5%	8%	0%	1%	2%
Transportation /Material Moving	10%	19%	0%	2%	1%

Source: U.S. Census Bureau and Utah Department of Workforce Services.

RACE AND ETHNICITY

In the service area about 15 percent of the population is minority. Of the 15 percent 6.7 percent are Hispanic. Native Americans are included in the “other minority” are the largest single minority group. Of the three counties, Daggett has the smallest ethnic minority with 6.0 percent of which 3.7 percent are Hispanic. Duchesne County has 12.9 percent minority with 6.0 percent Hispanic and Uintah County has a 17.1 percent minority population of which 7.1 is Hispanic. Both Duchesne and Uintah counties have larger proportions of non-Hispanic (Native American) minorities than Hispanics.

Minority Population Uintah Basin ESA				
	Total* Population	Percent White not Hispanic	Percent Minority	
			not Hispanic	Hispanic
Utah Statewide	2,763,885	80.4%	6.7%	13.0%
Uintah Basin	52,254	84.6%	8.7%	6.7%
Daggett County	1,059	94.4%	2.5%	3.1%
Duchesne County	18,607	87.1%	6.9%	6.0%
Uintah County	32,588	82.8%	10.0%	7.1%
*Total population - 2010 April 1st census count.				
Source: U.S. Census Bureau, 2010 Census				

POVERTY RATES

The recession has caused poverty rates to increase. The U.S. Poverty rate (2005-2009) was 13.5 percent. Utah’s corresponding rate was 10.4 percent. In the Uintah Basin Service Area the county rates were Daggett (6.2 percent), Duchesne (10.3 percent) and Uintah (10.4 percent). For the population as a whole, the service area is obviously doing much better than the nation and about the same as the state. What one demographic factor is most likely to increase the probability of being in poverty? Being a child in a female-headed household. In addition, children in general are more likely to be “poor.” In all counties, poverty rates for children under 18 are higher than for the general population. Duchesne and Uintah counties have rates about 10 to 12 percent, right at the state average. Daggett’s rate for children is 3.9 percent. The poverty rate for the population age 65 and over was a low 2.2 percent in Daggett. Duchesne’s rate was 5.7 percent and Uintah County’s rate is 9.1 percent.

Poverty Rates 2005-2009			
Uintah Basin ESA			
	Poverty Rates		
	All Individuals	Children Under 18	65 and Over
Utah Statewide	10.4%	11.0%	6.8%
Daggett County	6.2%	3.9%	2.2%
Duchesne County	10.3%	10.3%	5.7%
Uintah County	10.4%	12.5%	9.1%
Source: U.S. Census Bureau, American Community Survey 2005-2009.			

C. FUTURE ECONOMIC ACTIVITY

Industry and occupational employment projections for the Uintah Basin Service Area are part of the Utah Non-metro area set of industry and occupational employment projections. Industry and occupational projections do not follow ESA boundaries. This scenario results from the survey sampling procedures outlined by the Bureau of Labor Statistics—the overseer of the Occupational Employment Statistics program. Because the staffing patterns resulting from the survey do not statistically support ESA-level projections, the figures presented here will be for “Non-metro” Utah—the 18 rural counties. Also, keep in mind that in this case publicly “owned” education, hospitals, and the postal service employment is included in their respective industry classifications rather than in government (the typical presentation).

INDUSTRY PROJECTIONS

The average employment growth rate for the non-metro area for the next 10 years is 2.0 percent per year. Uintah Basin industry sectors prominent in the projections include mining, retail trade education/healthcare, leisure and hospitality, and government. Although all industries (excluding agriculture) are projected to grow, those with higher than 2.0 percent rates of growth are education/healthcare, leisure and hospitality, and government. If energy prices continue to increase then mining will feel the demand and an increase in jobs.

Industry Projections

Uintah Basin ESA

	NonMetro Industry Projections			
	Employment		New Jobs 2008-2018	Annual Growth Rate
	2008	2018		
Covered Agriculture/Forestry/Fishing	8,630	7,900	-730	-0.7%
Mining	8,760	9,810	1,050	1.0%
Construction	7,570	8,480	910	1.0%
Manufacturing	4,660	5,280	620	1.1%
Wholesale Trade	2,570	3,010	440	1.4%
Retail Trade	12,610	15,240	2,630	1.7%
Transportation and Warehousing	4,700	5,240	540	1.0%
Utilities	1,560	1,790	230	1.2%
Information	1,240	1,420	180	1.2%
Financial Activities	3,220	3,860	640	1.7%
Professional and Business Services	5,000	6,720	1,720	2.9%
Educational, Health and Social Services*	20,070	27,410	7,340	3.0%
Leisure and Hospitality	12,680	15,580	2,900	1.9%
Other Services	3,000	3,590	590	1.6%
Government*	10,880	13,210	2,330	1.8%
Self-Employed, Unpaid Family Workers	15,240	18,290	3,050	1.7%

* Public hospitals and education are included in the Educational/Health/Social Services industry and excluded from government. U.S. Postal Service employment is included in transportation warehousing.













































Source: Utah Department of Workforce Services

OCCUPATIONAL PROJECTIONS

The occupational projections for the Non-metro area are available on the website <http://jobs.utah.gov/wi/pubs/outlooks/utahjoboutlook/index.html>. The Uintah Basin ESA is included in these projections. To aid the service areas in identifying occupations more appropriate for training, WRA has produced Training Occupations lists for each service area. These are provided online. The Occupations for Training List for the Uintah Basin was produced for just the Uintah Basin to reflect Uintah Basin jobs. The list specifies those occupations that have training potential, labor market demand, and better wages. The Occupations for Training List for the Uintah Basin specifies those occupations that have training potential, labor market demand, and better wages.

The graph below presents occupational projections for occupational categories and not individual job titles. It provides more summary information about the occupations in the area in the form of the share of job openings and the level of occupational growth expected in the two areas. The composition of the

category shares are similar in both contexts with education, healthcare, food preparation, sales, office and administrative, construction/extraction, and transportation and material movement having larger shares of job openings. Occupational categories with much higher than average job growth rates (greater than 3.0 percent) include: community and social services, education, healthcare, and personal care.

Occupational Projections 2008-2018			
Uintah Basin ESA			
	Nonmetro* Utah		
	Share of Projected Job Openings	Projected Occupational Annual Growth	
Management	 5%	 1.2%	
Business/Financial	 2%	 2.8%	
Computer/Mathematical	 0%	 2.4%	
Architecture/Engineering	 1%	 2.7%	
Life/Physical/Social Science	 2%	 1.7%	
Community/Social Services	 2%	 3.4%	
Legal	 0%	 1.8%	
Education/Library	 7%	 3.2%	
Arts/Design/Entertainment/Sports	 1%	 2.3%	
Healthcare Practitioners/Technical	 4%	 3.7%	
Healthcare Support	 3%	 5.3%	
Protective Service	 2%	 2.3%	
Food Preparation/Serving	 11%	 2.5%	
Building/Grounds Cleaning	 4%	 1.8%	
Personal Care/Service	 4%	 3.1%	
Sales	 12%	 1.8%	
Office/Administrative Support	 12%	 1.9%	
Farming/Fishing/Forestry	 2%	 -0.5%	
Construction/Extraction	 9%	 1.5%	
Installation/Maintenance/Repair	 5%	 2.0%	
Production	 4%	 1.6%	
Transportation /Material Moving	 7%	 1.5%	
*Nonmetro includes Beaver, Carbon, Daggett, Duchesne, Emery, Garfield, Grand, Iron, Kane, Millard, Piute, Rich, San Juan, Sanpete, Sevier, Uintah, Wasatch, & Source: Utah Department of Workforce Services.			

SKILL-BASED PROJECTIONS

By combining occupational projections and skills/knowledge areas from the O*Net database, it is possible to determine which skills will be in high demand in the future. It may be tempting to focus only on technical skills or healthcare skills or computer skills when training the labor force. However, skill-based projections show that basic skills provide the underlying foundation from which these other technical skills can be learned.

As the accompanying table shows, basic skills such as “reading, writing and arithmetic” rise to the top of the list for in-demand skills and knowledge areas. Being accomplished in learning new skills, critical thinking, and time management will also be important for jobs today and in the future. Interestingly, projections indicate that an acquaintance with customer service techniques is the most important knowledge area.

Below are the skills and knowledge categories ranked in order of importance that originate from the occupational skills projections for the Non-Metro geographic areas. The order of importance for skills is reading comprehension, active listening, critical thinking, and speaking. These are the top four skills. For

Skills and Knowledge Projections			
Uintah Basin ESA			
Nonmetro** Utah			
Top In-Demand Skills		Top in-Demand Knowledge Areas	
	Projected 2008-2018 Annual Employment		Projected 2008-2018 Annual Employment
Reading Comprehension	2,596	Customer and Personal Service	2,250
Active Listening	2,495	English Language	975
Critical Thinking	2,297	Clerical	761
Speaking	1,933	Education and Training	715
Coordination	1,930	Mechanical	664
Active Learning	1,897	Mathematics	594
Instructing	1,863	Psychology	565
Monitoring	1,778	Administration and Management	490
Writing	1,667	Computers and Electronics	461
Time Management	1,655	Building and Construction	417
*Employment in occupations in which the listed skill or knowledge area is at least moderately important to job performance, and the occupation requires at least a moderate level of skill-related competence.			
**Nonmetro includes Beaver, Carbon, Daggett, Duchesne, Emery, Garfield, Grand, Iron, Kane, Millard, Piute, Rich, San Juan, Sanpete, Sevier, Uintah, Wasatch, & Wayne counties.			
Source: Utah Department of Workforce Services 2008-2018 Occupational Employment Projections.			

in demand knowledge areas customer service was by far the most important. This was followed by English language, clerical, education and training mechanical and math.

VI. CASTLE COUNTRY AND SOUTHEAST ECONOMIC SERVICE AREAS: Carbon, Emery, Grand and San Juan Counties

By James Robson, Economist

A. CURRENT ECONOMY

CARBON COUNTY

During 2010, Carbon County recorded 109 overall nonfarm job losses, a reduction of 1.1 percent. While employment in the mining industry was quite stable during the year at about 1,087 jobs, this was 209 fewer than the 1,296 average for mining employment in 2009. Other industries that lost some jobs during 2010 were retail trade (-68), state and local government (-55), healthcare (-12), and manufacturing (-10).

Several industries in Carbon County had job gains in 2010 over 2009. Professional and business services increased by 137 jobs with gains in business, employment, and other professional services. The construction industry grew by 44 jobs or 13.4 percent. Other services—repair, maintenance, and personal services—increased by 7.9 percent or 26 jobs.

The labor market in Carbon County ended 2010 on a positive note with the fourth quarter showing the best job increases for the year. In the last three months employment averaged 9,714 jobs, 292 more than recorded at the end of 2009.

In 2007, the average unemployment rate for Carbon County was at the low rate of 3.9 percent or 377 unemployed residents. The unemployment rate has risen each year since averaging 8.2 percent during 2010 about 848 unemployed. The jobless rate has since receded to 7.4 percent by the spring of 2011.

EMERY COUNTY

The job market in Emery County was stable for most industries in 2010 with slight average job losses compared to 2009. There was one major exception to this overall picture—professional and business services—which added an average 123 new jobs in 2010. Overall, nonfarm employment was 3,781 for the year or 86 more jobs than in 2009. This level of employment was just 120 jobs below the average level of about 3,900 jobs that prevailed in the County during 2006 and 2007.

Prior to the recession, in 2007, the average unemployment rate for Emery County was 3.6 percent or 183 unemployed residents. The unemployment rate has increased each year with some loss of mining jobs and the effects of recession, reaching a peak unemployment rate of 8.3 percent in December 2009 with an estimated 445 person unemployed. In 2010 the unemployment rate moderated somewhat with an average rate of 7.8 percent. Through the spring of 2011 it has only declined slightly too about 7.6 percent.

GRAND COUNTY

The overall employment situation in Grand County was down by 22 jobs in 2010. This was a reduction 0.5 percent. Job losses were most evident in the goods producing industries of mining, construction, and manufacturing. Together they receded by 12.3 percent in 2010 compared to 2009, losing 52 jobs and averaging a total of 375. In 2007 and 2008 the goods producing industries averaged 500 jobs.

Leisure and hospitality, the largest industry in Grand County, gained 29 jobs or 1.9 percent in 2010. Local government, which includes public education, added 20 jobs and trade and transportation picked up 8 new jobs.

Just like other counties in the region and around the state, the 2007 unemployment rate was favorable at 4.9 percent, with 255 residents unemployment. Because of the recession and the loss in recent years of goods producing jobs, unemployment rate has increased year each. In 2010, the Grand County unemployment rate averaged 10.8 percent with 586 people unable to find work.

SAN JUAN COUNTY

In somewhat sharp contrast to Grand County, the goods producing industries of mining and construction in San Juan County increased in employment by 63 and 67 jobs respectively during 2010. These gains were offset to a degree by manufacturing job losses of 46. Other industry gainers in San Juan County were professional and business services (plus 50) and private education/healthcare (plus 21). Unfortunately, leisure/hospitality, trade/transportation, and government reduced employment by 60, 17, and 12 respectively.

Overall, nonfarm jobs within the County increased by 1.6 percent, with 66 additional jobs, and total 2010 annual average employment of 4,184.

San Juan County had an average unemployment rate of 13.3 percent in 2010, the highest of any county in the state. In 2007, unemployment was considerably lower—5.6 percent. The impact of the recession on leisure/hospitality, manufacturing, and trade/transportation industries is responsible of the unemployment increases the past three years. In the spring of 2011 the San Juan County unemployment rate has improved to about 12.3 percent.

Job Growth by Industry Castle Country / Southeast ESAs

	December 2009 to December 2010 Change in Nonfarm Jobs					
	Carbon	Emery	CC ESA	Grand	San Juan	SE ESA
Total Percent Change	3.0%	0.3%	2.3%	-0.9%	2.0%	0.6%
Mining	-57	-17	-74	-19	34	15
Construction	201	12	213	-1	42	41
Manufacturing	13	-2	11	2	-44	-42
Wholesale Trade	13	2	15	13	15	28
Retail Trade	-53	12	-41	23	-10	13
Transportation & Warehousing	45	9	54	-5	-4	-9
Utilities	-3	-12	-15	-2	0	-2
Information	9	1	10	-2	-1	-3
Financial Activities	-12	-4	-16	2	4	6
Professional & Business Services	71	7	78	5	78	83
Private Education	-6	0	-6	1	5	6
Healthcare and Social Services	-22	6	-16	-14	24	10
Leisure and Hospitality	44	-4	40	-69	-90	-159
Other Services	72	-2	70	-4	5	1
Government	-29	2	-27	36	19	55

Source: Utah Department of Workforce Services.

YEAR-END JOB PICTURE

As 2010 came to an end, the labor market was gathering some modest strength in most areas of the state. In Castle Country and the Southeast this was true for Carbon and San Juan Counties. Both of these counties saw significant contributions to job growth from December 2009 to December 2010 provided

Unemployment Rates Castle Country / Southeast ESAs

	Annual Unemployment Rates			
	2007	2008	2009	2010
Utah Statewide	2.8%	3.7%	7.1%	7.7%
Castle Country	3.8%	4.3%	7.4%	8.0%
Carbon County	3.9%	4.5%	7.7%	8.2%
Emery County	3.6%	4.0%	6.8%	7.8%
Southeast ESA	5.3%	6.3%	10.5%	12.0%
Grand County	4.9%	6.1%	9.5%	10.8%
San Juan County	5.6%	6.6%	11.5%	13.3%

Source: Utah Department of Workforce Services

by professional and business services and construction. Carbon County also enjoyed gains in leisure and hospitality unlike other counties in the region.

Emery and Grand Counties year-end job picture was a mixed bag of losses and gains. Of concern to the Southeast counties of

Grand and San Juan, leisure and hospitality lost a considerable number of jobs over the 12 months ending in December 2010.

RECENT HIRING ACTIVITY

The most recent information we have for industry new hires by County, third quarter 2010, displays fairly normal patterns for each county in Castle Country and the Southeast. Industries that display a large number of new hires are characterized by seasonal, part-time, and relatively low wage jobs that experience higher rates of turnover. Remember that a new hire indicates a person who is new to a particular employer that wasn't with them the previous quarter. Leisure/hospitality and trade are prime examples of such industries. Other industries that are growing have new positions and turnover to fill, such as healthcare, education, and construction.

The highest number of new hires in Emery County was in professional and business services.

New Hires by Industry*						
Castle Country / Southeast ESAs						
	Third Quarter 2010 New Hires					
	Carbon	Emery	CC ESA	Grand	San Juan	SE ESA
Mining	54	17	71	NA	70	70
Construction	260	90	350	33	123	156
Manufacturing	23	3	26	8	25	33
Wholesale Trade	34	NA	34	5	4	9
Retail Trade	183	103	286	115	75	190
Transportation & Warehousing	51	11	62	7	12	19
Utilities	4	8	12	0	0	0
Information	26	19	45	4	NA	4
Financial Activities	15	NA	15	22	NA	22
Professional & Business Services	NA	117	117	NA	NA	NA
Education, Healthcare, Social Svcs	223	49	272	61	211	272
Leisure and Hospitality	233	NA	233	489	189	678
Other Services	72	13	85	5	13	18
Public Administration*	46	17	63	27	94	121

*Unlike typical industry data, these industry groups include government employment--except federal.
 New hires represent employees on a firm's payroll who weren't on the payroll in the previous quarter.
 Source: Utah Department of Workforce Services.

CURRENT INDUSTRIAL BASE

In each of these four counties a few important industries dominate economic activity. The Carbon County economic has four industry sectors that account for roughly 57 percent of all nonfarm jobs. Government provides 22 percent of all jobs. Three private combine for 34 percent of employment with almost equal shares—mining, retail trade, and healthcare.

Emery counties most important industries for jobs are government with 24 percent, mining with about 15 percent, construction 13 percent, retail trade 12 percent, and utilities 11 percent. Together these five industries provide 74 percent of all employment.

Grand County has just three industries which contribute 71 percent of all jobs. Tourism dominates economic activity with leisure/hospitality and retail trade adding 35 percent and 16 percent of all jobs respectively. Finally, government activities provide 21 of employment.

The largest government sector is found in San Juan county with 38 percent of jobs followed by leisure/hospitality 13 percent, healthcare 12 percent, and mining 9 percent. All together these four industries combine for 72 percent of total employment.

Industry Employment Distribution Castle Country / Southeast ESAs							
	Share of 2010 Nonfarm Employment by Industry						
	Carbon	Emery	CC ESA	Grand	San Juan	SE ESA	Statewide
Mining	11.5%	14.7%	12.4%	2.4%	9.2%	5.7%	0.9%
Construction	4%	13%	6%	5%	6%	6%	6%
Manufacturing	3%	1%	3%	1%	3%	2%	9%
Wholesale Trade	5%	0%	4%	1%	1%	1%	4%
Retail Trade	12%	12%	12%	16%	8%	12%	12%
Transportation & Warehousing	5%	2%	4%	1%	1%	1%	4%
Utilities	1.4%	10.7%	4.1%	0.6%	0.2%	0.4%	0.3%
Information	1%	3%	2%	1%	0%	0%	2%
Financial Activities	3%	2%	3%	4%	1%	3%	6%
Professional & Business Services	7%	6%	7%	5%	5%	5%	13%
Educational Services (Private)	1%	0%	1%	1%	1%	1%	3%
Healthcare and Social Services	11%	2%	8%	5%	11%	8%	10%
Leisure and Hospitality	8%	7%	8%	35%	13%	25%	9%
Other Services	4%	4%	4%	1%	2%	2%	3%
Government	22%	24%	23%	21%	38%	29%	18%

Source: Utah Department of Workforce Services.

FIRM SIZE

In the Castle Country ESA, about 69 percent of firms in the area had fewer than 10 employees with 16 percent of all jobs in the first quarter of 2010. On the other hand, just 54 companies (6 percent) had 50 or more workers and 48 percent of all nonfarm jobs.

For the Southeast ESA, about 78 percent of the firms had fewer than 10 employees with 20 percent of all jobs in the first quarter of 2010. There were 255 companies (4 percent) with 50 or more workers and 45 percent of all nonfarm jobs.

B. DEMOGRAPHICS OF LABOR FORCE AND CUSTOMER GROUPS

This report will examine several demographic groups as follows:

- **Labor Force**—individuals living in the area which are over the age of 16 and are considered employed or unemployed (to be considered unemployed an individual must be searching for work).
- **Nonfarm Jobs or Nonfarm Employment**—jobs are counted by place of employment rather than by residence. Also, an individual can have more than one job.
- **UI/EB Claimants**—Individuals filing a weekly claim for unemployment insurance for the week including the 12 of the month under the state unemployment program or state extended benefits program (does not include federal or military workers.)
- **DWS Intensive/Training Customers**—those customers of the Department of Workforce Services who are case-managed or are receiving training assistance.
- **DWS Assisted Customers**—those customers who received a recorded employment-related service from a DWS employee, but were not case-managed or receiving training assistance.
- **DWS Self-Directed Customers**—those customers using our online employment services only.

COMMUTER PATTERNS

Labor Force Commuting Patterns 2005-2009

Castle Country / Southwest ESAs

	Worked in County of Residence	Outside Resident County in Utah	Worked Outside of Utah
Statewide	82.3%	16.4%	1.2%
Castle Country ESA	84.9%	14.2%	0.9%
Carbon County	90.3%	8.5%	1.2%
Emery County	75.0%	24.8%	0.3%
Southeast ESA	88.9%	5.3%	5.8%
Grand County	95.3%	3.8%	0.8%
San Juan County	83.5%	6.5%	10.0%

















Source: U.S. Census Bureau; American Community Survey.

Castle Country / Southeast workers are less likely to commute to jobs outside their county of residence than the average for the State of Utah with the exception of Emery County. About one out of four resident workers leave Emery County to work compared to a statewide average of 16.4 percent.

COUNTY PATTERNS

In terms of labor force, jobs, unemployment claimants, and DWS customers within the Castle Country / Southeast counties, Carbon County accounts for 37 percent of the labor force and 43 percent of total jobs. Carbon also claims 27 percent of all claimants and 47 percent of all DWS Customers. Grand, Emery, and San Juan Counties have similar yet somewhat different patterns of these four measures. The labor force and jobs percentages with vary according to commuting patterns. The labor force is a measure of where people live and jobs are counted where people work. Therefore commuting pattern change the relationship between these measures as more or less workers leave a county for employment.

















































Unemployment claimants and DWS customer patterns are influenced by the industry composition within each county. Counties whose industries have pronounced seasonal patterns with have more unemployment insurance claimants and counties that have structural changes among their industries often see greater percentages of customers.

Jobs, Labor Force, UI Claimants, and Customers Castle Country / Southeast ESAs					
	Share of ESA Total				
	2010 Nonfarm Jobs	2005-2009 Labor Force	March 2011 UI/EB Claimants	March 2011 DWS Customers	
Carbon County	 43.2%	 36.6%	 27.2%	 46.8%	
Emery County	 17.2%	 19.4%	 15.6%	 16.9%	
Grand County	 20.5%	 20.2%	 36.0%	 24.1%	
San Juan County	 19.1%	 23.8%	 21.1%	 12.2%	
Source: Utah Department of Workforce Services.					

AGE

Individuals between the ages of 25 and 34 make up the largest share of employment and DWS customers (DWS self-directed customers, DWS assisted customers, and DWS intensive/training customers). They make up 21 percent jobs holders and 23 percent of the labor force. This age group accounts for about one-third of all DWS customers and one-fourth of unemployment insurance claimants.

Age of Demographic/Customer Groups Castle Country / Southeast ESA

	2005-2009 Labor Force*	2009 Employ- ment	March 2011 UI/EB Claimants	March 2011 DWS Customers		
				Intensive/ Training	Assisted	Self Directed
18 and under	 8%	 4%	 0%	 1%	 2%	 4%
19-21	 4%	 6%	 4%	 8%	 10%	 11%
22-24	 6%	 6%	 6%	 10%	 10%	 10%
25-34	 21%	 23%	 25%	 32%	 33%	 29%
35-44	 19%	 19%	 24%	 28%	 21%	 19%
45-54	 24%	 22%	 22%	 15%	 15%	 17%
55-64	 15%	 15%	 15%	 4%	 7%	 9%
65 and Older	 3%	 4%	 3%	 1%	 1%	 1%




















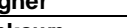






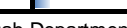



*Labor force age grouping is "19 and under" and "20-21 years."

Source: U.S. Census Bureau and Utah Department of Workforce Services.

EDUCATION

Educational attainment in the population in the four counties does vary. About 90 percent of persons in Emery County have a high school diploma or higher compared to 79 percent in San Juan County (for those persons 25 years old or older). Carbon and Grand have 86 and 83 percent of their adult population with a high school education or above. The educational attainment of unemployment claimants is different. About 62 percent of claimants have a high school diploma or higher (includes GED), and 16 percent of claimants have less than a high school degree. For DWS customers (not claimants) 91 percent had a high school degree or higher. For intensive/training DWS customers that percentage was 78, for DWS assisted 92 percent and for DWS self-directed it was 93 percent. About eight percent of claimants and five percent of DWS customers had Bachelor's Degrees, which suggests with other evidence that there is an important relationship between educational attainment and the level and duration of unemployment.















































































































Education of Demographic/Customer Groups Castle Country / Southeast ESAs

	2005-2009 Population 18-24	2005-2009 Population 25 & Older	March 2011 UI/EB Claimants	March 2011 DWS Customers		
				Intensive/ Training	Assisted	Self Directed
Less Than High School	 20%	 15%	 16%	 14%	 5%	 4%
High School	 42%	 34%	 35%	 59%	 65%	 58%
Post-Secondary, Some College	 37%	 34%	 19%	 19%	 25%	 27%
Bachelor's or Higher	 1%	 16%	 8%	 1%	 3%	 7%
Not Reported/Unkown	 0%	 0%	 22%	 8%	 3%	 3%

Source: U.S. Census Bureau and Utah Department of Workforce Services.

OCCUPATIONS

The occupations of DWS customers show some interesting relationships. A relatively high percentage of DWS customers (above 20 percent) identify with management occupations. This appears to be a mistake in the coding of customers. There is wide variety of occupations among DWS customers and UI claimants. Relatively high percentages of DWS customers and claimants were in food preparation and service and construction/extraction occupations. These occupations have significant seasonal variations in employment.

Occupations of Demographic/Customer Groups Castle Country / Southeast ESA						
	2005-2009 Employment	March 2011 UI/EB Claimants	March 2011 DWS Customers			
			Intensive/ Training	Assisted	Self Directed	
Management	 9%	 4%	 18%	 17%	 23%	
Business/Financial	 2%	 1%	 4%	 3%	 5%	
Computer/Mathematical	 1%	 1%	 2%	 1%	 3%	
Architecture/Engineering	 1%	 1%	 2%	 3%	 2%	
Life/Physical/Social Science	 1%	 2%	 2%	 1%	 2%	
Community/Social Services	 2%	 0%	 3%	 3%	 3%	
Legal	 0%	 0%	 0%	 1%	 1%	
Education/Library	 8%	 1%	 4%	 4%	 3%	
Arts/Design/Entertainment/Sports	 1%	 1%	 2%	 2%	 4%	
Healthcare Practitioners/Technical	 3%	 2%	 2%	 2%	 3%	
Healthcare Support	 2%	 1%	 5%	 5%	 4%	
Protective Service	 2%	 1%	 3%	 5%	 3%	
Food Preparation/Serving	 6%	 11%	 13%	 16%	 8%	
Building/Grounds Cleaning	 5%	 8%	 7%	 5%	 4%	
Personal Care/Service	 3%	 3%	 2%	 1%	 1%	
Sales	 10%	 6%	 6%	 6%	 7%	
Office/Administrative Support	 13%	 12%	 7%	 6%	 10%	
Farming/Fishing/Forestry	 1%	 2%	 2%	 1%	 1%	
Construction/Extraction	 12%	 20%	 11%	 14%	 8%	
Installation/Maintenance/Repair	 6%	 6%	 2%	 2%	 2%	
Production	 6%	 5%	 1%	 1%	 2%	
Transportation /Material Moving	 7%	 11%	 2%	 2%	 1%	
Source: U.S. Census Bureau and Utah Department of Workforce Services.						

RACE AND ETHNICITY

In the Castle Country / Southeast area about 25 percent of the population is minority. Of the 25 percent 8.6 percent are Hispanic and 16.3 percent non-Hispanic minorities mostly American Indian. Of the four counties, San Juan has the largest "minority population" with 56.1 percent . Almost 50 percent of San

Juan's population is American Indian, which includes Hispanics who are American Indian. Hispanic is ethnic group, not a racial group, and can be of any race.

Minority Population Castle Country / Southeast ESAs				
	Total* Population	Percent White not Hispanic	Percent Minority	
			not Hispanic	Hispanic
Utah Statewide	2,763,885	80.4%	6.7%	13.0%
Castle Country / Southeast	34,947	75.2%	16.3%	8.6%
Carbon County	21,403	84.1%	3.4%	12.4%
Emery County	10,976	92.1%	1.9%	6.0%
Grand County	9,225	84.1%	6.3%	9.6%
San Juan County	14,746	43.9%	51.7%	4.4%
*Total population - 2010 April 1st census count. Source: U.S. Census Bureau, 2010 Census				

POVERTY RATES

The recession has caused poverty rates to increase. The U.S. Poverty rate (2005-2009) was 13.5 percent. Utah's corresponding rate was 10.4 percent. In the Castle Country / Southeast ESAs poverty rates are higher than the state averages for all individuals, children, and the elderly. Of particular note are the San Juan County poverty rate that are more than 3-times the statewide rates for individuals, children and those 65 year of age and above. What one demographic factor is most likely to increase the probability of being in poverty? Be a child in a female-headed household. In all counties except Emery, poverty rates for children under 18 years are higher than for the general population and those over 65 years of age.

Poverty Rates 2005-2009 Castle Country / Southeast ESAs			
	Poverty Rates		
	All Individuals	Children Under 18	65 and Over
Utah Statewide	10.4%	11.0%	6.8%
Castle Country / Southeast	17.6%	22.2%	13.4%
Carbon County	12.5%	15.6%	7.4%
Emery County	12.4%	12.2%	13.1%
Grand County	16.7%	19.3%	11.0%
San Juan County	28.7%	36.4%	28.6%
Source: U.S. Census Bureau, American Community Survey 2005-2009.			

C. FUTURE ECONOMIC ACTIVITY

Industry and occupational employment projections for the Castle Country / Southeast ESAs are part of the Utah Non-metro industry and occupational employment projections. Industry and occupational projections do not follow ESA boundaries. This results from the survey sampling procedures outlined by the U.S. Bureau of Labor Statistics for the Occupational Employment Survey. Because the staffing patterns resulting from the survey do not statistically support ESA-level projections, the figures presented here will be for 18 “nonmetro” Utah counties.

INDUSTRY PROJECTIONS

































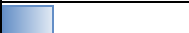









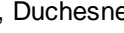

The average employment growth rate for the non-metro area for the next 10 years is 2.0 percent per year. Castle Country / Southeast industries of particular importance in the projections include mining, leisure/hospitality, retail trade, education/healthcare, and government. Although all industries (excluding agriculture) are projected to grow, those with higher than 2.0 percent rates of growth are

Industry Projections Castle Country / Southeast ESAs				
	NonMetro Industry Projections			
	Employment		New Jobs 2008-2018	Annual Growth Rate
	2008	2018		
Covered Agriculture/Forestry/Fishing	8,630	7,900	-730	-0.7%
Mining	8,760	9,810	1,050	1.0%
Construction	7,570	8,480	910	1.0%
Manufacturing	4,660	5,280	620	1.1%
Wholesale Trade	2,570	3,010	440	1.4%
Retail Trade	12,610	15,240	2,630	1.7%
Transportation and Warehousing	4,700	5,240	540	1.0%
Utilities	1,560	1,790	230	1.2%
Information	1,240	1,420	180	1.2%
Financial Activities	3,220	3,860	640	1.7%
Professional and Business Services	5,000	6,720	1,720	2.9%
Educational, Health and Social Services*	20,070	27,410	7,340	3.0%
Leisure and Hospitality	12,680	15,580	2,900	1.9%
Other Services	3,000	3,590	590	1.6%
Government*	10,880	13,210	2,330	1.8%
Self-Employed, Unpaid Family Workers	15,240	18,290	3,050	1.7%
* Public hospitals and education are included in the Educational/Health/Social Services industry and excluded from government. U.S. Postal Service employment is included in transportation warehousing. Source: Utah Department of Workforce Services				

education/healthcare, leisure and hospitality, and government. Energy prices will continue to influence the ups and downs of mining employment in this region.

OCCUPATIONAL PROJECTIONS

The occupational groups in nonmetro Utah that expected to average 9 percent or more annual openings are sales, office/administrative support, food preparation/serving, and construction/extraction. This is in line with the recent hiring statistics presented earlier in this document. More detailed occupational

Occupational Projections 2008-2018			
Castle Country / Southeast ESAs			
	Nonmetro* Utah		
	Share of Projected Job Openings	Projected Occupational Annual Growth	
Management	 5%	 1.2%	
Business/Financial	 2%	 2.8%	
Computer/Mathematical	 0%	 2.4%	
Architecture/Engineering	 1%	 2.7%	
Life/Physical/Social Science	 2%	 1.7%	
Community/Social Services	 2%	 3.4%	
Legal	 0%	 1.8%	
Education/Library	 7%	 3.2%	
Arts/Design/Entertainment/Sports	 1%	 2.3%	
Healthcare Practitioners/Technical	 4%	 3.7%	
Healthcare Support	 3%	 5.3%	
Protective Service	 2%	 2.3%	
Food Preparation/Serving	 11%	 2.5%	
Building/Grounds Cleaning	 4%	 1.8%	
Personal Care/Service	 4%	 3.1%	
Sales	 12%	 1.8%	
Office/Administrative Support	 12%	 1.9%	
Farming/Fishing/Forestry	 2%	 -0.5%	
Construction/Extraction	 9%	 1.5%	
Installation/Maintenance/Repair	 5%	 2.0%	
Production	 4%	 1.6%	
Transportation /Material Moving	 7%	 1.5%	
*Nonmetro includes Beaver, Carbon, Daggett, Duchesne, Emery, Garfield, Grand, Iron, Kane, Millard, Piute, Rich, San Juan, Sanpete, Sevier, Uintah, Wasatch, & Wayne counties.			
Source: Utah Department of Workforce Services.			

projections for the nonmetro area are available on the website. To aid the service areas in identifying occupations more appropriate for training, WRA has produced training occupations lists for each service area. These are also provided online. The training occupations list specifies those occupations that have training potential, labor market demand, and better wages.

VII. CENTRAL ECONOMIC SERVICE AREA: Millard, Sanpete, Sevier, Piute, and Wayne Counties

By Lecia Parks Langston, Economist

A. CURRENT ECONOMY

Brief Overview

While the Central Economic Service Area has certainly moved into the recovery stage of the business cycle, only two counties (Millard and Sevier) are currently experiencing job growth. On the other hand, expansion in these two counties proved sufficient to push the Central ESA employment totals into positive territory. While the year-to-year change in jobs remains the best local economic indicator, jobless rates within the ESA also provide evidence of a recovery. County unemployment rates edged downward through most of 2010 and into 2011. Although on annual basis 2010 jobless rates appear higher than in 2009, in most cases, they started at a high level at the beginning of the year and then slowly declined throughout the remaining months. ESA-wide industries showing the most employment

Job Growth by Industry Central ESA

	December 2009 to December 2010 Change in Nonfarm Jobs					
	Millard	Piute	Sanpete	Sevier	Wayne	ESA
Total Percent Change	7.4%	-3.5%	-3.5%	2.2%	-1.5%	0.9%
Covered Agriculture/Forestry/Fishing	2	0	19	21	-1	41
Mining	16	-15	-6	28	-11	12
Construction	167	18	-33	-10	-16	126
Manufacturing	32	0	-25	49	-1	55
Wholesale Trade	-3	1	8	20	-1	25
Retail Trade	23	-5	-166	-113	-15	-276
Transportation and Warehousing	-3	1	-9	117	0	106
Utilities	-6	0	0	0	0	-6
Information	9	0	-2	11	2	20
Financial Activities	-1	-1	0	5	0	3
Professional and Business Services	11	0	8	-74	1	-54
Educational, Health and Social Services	26	0	10	52	5	93
Leisure and Hospitality	-24	-10	-14	49	24	25
Other Services	2	-1	-22	0	7	-14
Government	30	1	-1	35	2	67

Source: Utah Department of Workforce Services.

growth in the final month of 2010 included construction, transportation/warehousing, private education/health/social services, and government. The largest employment declines occurred in retail trade and professional/business services. It appears that the year-to-year decline in retail trade may reflect less seasonal holiday hiring rather than actual job loss.

As the economic recovery and expansion continues, the Central ESA should see most facets of its economy gain strength although pockets of distress will remain. Nevertheless, most job-losing counties should move into the black and overall job growth should improve in 2011. In tandem with a better employment picture, jobless rates are also expected to decrease.

MILLARD COUNTY

Millard County led the job-growth pack in December 2010 with a 7.4 percent, 280-job year-to-year gain. However, many of these new positions occurred in the construction industry and reflect work on the wind farm. Obviously, they will eventually evaporate from the county's totals. Nevertheless, the current expansion isn't a one-industry wonder. Moderate job growth also occurred in mining, manufacturing, retail trade, private education/health/social services, and government. In other words, expansion in these industries should be sufficient to sustain employment growth in the future.

As in most counties, unemployment rates have trended downward and initial claims for unemployment insurance have also dropped from the height of the recession. Permitting for residential construction has yet to show improvement and will probably be the last economic indicator to mend. On the other hand, gross taxable sales are up substantially—primarily the result of heavy business investment spending related to the wind farm.

PIUTE COUNTY

As of December 2010, nonfarm jobs in Piute County were down 3.5 percent. Because of its small population base, that moderate employment loss translated into a decline of only 10 positions. Also, keep in mind that more than one-third of Piute County's workers commute outside the county for employment. This means job loss within the county may be mitigated by expansion elsewhere. The current employment contraction can be traced to three industries—mining, retail trade, and leisure/hospitality services. Gains in the construction industry did offset part of these losses.

In Piute County, initial claims for unemployment insurance have dropped from the height of the recession, but still remain relatively high. This pattern is echoed in the county's jobless rate which appears to have plateaued rather than declined. On the other hand, gross taxable sales collections have shown signs of growth in the most recent two quarters. This indicator provides some hope that employment may pick up in the months ahead.

SANPETE COUNTY

Currently, Sanpete County appears trapped in its own little jobless recovery. The worst of the job loss is over, but the county just hasn't been able to claw itself back to employment expansion. Between December 2009 and December 2010, nonfarm jobs declined by 3.5 percent representing more than 250 lost jobs. Unfortunately, most industries joined in the employment contraction. However, the primary offender, by far, proved retail trade. Again, the decline in retail trade employment in December may simply reflect less seasonal hiring rather than an actual loss in jobs. Other significant job-losing industries included manufacturing, construction, and other services. All the same, as the state and national economies continue to improve, Sanpete County can be expected to start generating employment gains sometime in 2011.

The fact that jobless rates seemed to have peaked at year-end and have started to deteriorate lends credence to the view that the county's economy will improve in 2011. In addition, both residential and nonresidential permitting improved in 2010 which should help produce new construction employment. Gross taxable sales have yet to show signs of recovery but should follow employment's lead in the future.

SEVIER COUNTY

Sevier County's business cycle has closely mimicked that of the state and the nation. Its recovery and employment expansion began at about the same time as these two larger areas. At the end of 2010, Sevier County was showing a 2.2 percent increase in jobs—more than doubling state and the national rates. As in Millard County, Sevier County's 260-job expansion was spread among a wide variety of industries. That signifies the existing recovery is stable and likely to continue. Moreover, Sevier County also experienced a large decline in retail trade that seems to be related to less seasonal hiring. Without that decline, the county's numbers would look even better. Major job-producing industries included transportation/warehousing, private education/health/social services, manufacturing, and leisure/hospitality services. Other than retail trade, the only other employment loss of note occurred in professional/business services.

As in other counties, jobless rates have trended downward in Sevier County. In addition, initial unemployment insurance claims slipped notably compared to the previous two years and car sales are up. Other indicators have yet to full come on board with the recovery. Both construction permitting and gross taxable sales have yet to show sustained patterns of growth.

WAYNE COUNTY

Wayne County ended 2010 with minor job loss of 1.5 percent (down 14 positions). The county actually generated employment during much of 2010 and this loss appears fairly negligible even for this small county. However, Aspen Education Group's announcement that it will close its two Wayne County

facilities in 2011 and idle more than 200 workers will eclipse the current economic activity. Aspen is currently the county's largest employer and the loss of 200 jobs in a county with less than 1,100 nonfarm jobs will prove a colossal economic blow. Industries currently losing employment include mining construction, and retail trade. On the other hand, leisure/hospitality services positions increased notably.

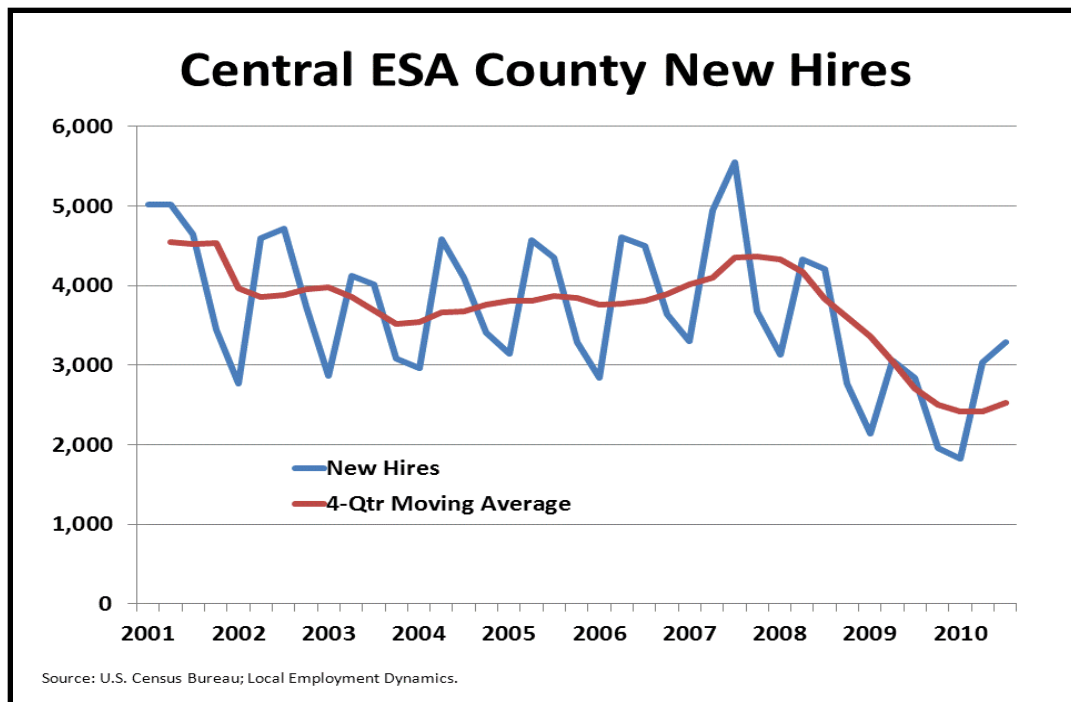
Jobless rates have been drifting down in Wayne County, too. However, they are poised to increase as Aspen phases out employment during 2011. Construction activity shows recent improvement. The one bright spot in this picture? Wayne County's sales are growing.

Unemployment Rates Central ESA			
	Annual Unemployment Rates		
	2008	2009	2010
Millard	3.5%	5.4%	6.5%
Piute	3.0%	6.4%	7.6%
Sanpete	4.4%	8.1%	9.4%
Sevier	4.2%	7.6%	8.3%
Wayne	5.7%	7.9%	9.3%
Source: Utah Department of Workforce Services.			

RECENT HIRING ACTIVITY

In the worst hiring quarter of the recession/recovery—first quarter 2010— the Central ESA showed more than 1,800 new hires. On average during the last two years, 2,600 people were hired per quarter in the ESA. The four-quarter moving average, which shows trends and eliminates seasonality, suggests that new hires hit their low point in early 2010 and are now improving.

The highest level of recent hiring activity (third quarter 2010) in the Central ESA occurred in the **leisure/hospitality** industry. This makes sense because the leisure/hospitality industry participates in a sizable amount of seasonal and turn-over related hiring. **Private education/health/social services** industries also showed a substantial number of new hires. **Retail trade** and, yes, **construction** also generated notable numbers of new employment. Keep in mind that these industries have high turnover rates and that a new hire simply represents a person who is currently on the employer's payroll but wasn't on that payroll during the previous quarter.



New hires were extremely limited in several industries. Utilities, mining, wholesale trade, financial activities, "other services," and information industries produced few new hires in the most recent quarter for which data is available.

New Hires by Industry*

Central ESA

	Third Quarter 2010 New Hires					
	Millard	Piute	Sanpete	Sevier	Wayne	ESA
Covered Agriculture/Forestry/Fishing	73	0	28	11	5	121
Mining	N/A	0	8	26	N/A	41
Construction	221	0	81	79	16	440
Manufacturing	38	0	48	19	N/A	208
Wholesale Trade	13	N/A	8	27	0	51
Retail Trade	89	0	117	171	19	467
Transportation and Warehousing	12	N/A	49	170	N/A	243
Utilities	4	0	0	0	0	5
Information	2	0	11	17	0	30
Financial Activities	N/A	N/A	21	24	0	49
Professional and Business Services	32	N/A	26	80	0	154
Educational, Health and Social Services	54	N/A	230	160	37	573
Leisure and Hospitality	100	19	131	284	65	688
Other Services	10	2	15	15	3	49
Public Administration*	18	3	93	42	4	167

Source: U.S. Census Bureau; Local Employment Dynamics.

*Unlike typical industry data, these industry groups include government employment--except federal.

New hires represent individuals on an employer's payroll who weren't on the payroll in the previous quarter.

CURRENT INDUSTRIAL BASE

In the Central ESA, government (which includes public education and higher education) accounts for, *by far*, the most nonfarm employment of any industrial sector. Area-wide, it supports almost 30 of total employment. In Piute (55 percent) and Sanpete (41 percent) counties the public sector dominates nonfarm employment even more. The presence of a regional prison and Snow College contribute to Sanpete County's larger-than-average share of government jobs. Sevier County shows the least dependence on public-sector employment, but even here government jobs account for one-fifth on nonagricultural positions.

Industry Employment Central ESA

	Share of Total 2010 Nonfarm Employment					
	Millard	Piute	Sanpete	Sevier	Wayne	ESA
Covered Agriculture/Forestry/Fishing	11%	0%	3%	1%	3%	4%
Mining	2%	0%	1%	7%	1%	3%
Construction	4%	6%	5%	4%	7%	4%
Manufacturing	4%	0%	9%	5%	1%	6%
Wholesale Trade	2%	1%	1%	3%	2%	2%
Retail Trade	13%	5%	12%	17%	9%	14%
Transportation and Warehousing	3%	9%	2%	11%	0%	6%
Utilities	11%	0%	0%	1%	2%	3%
Information	1%	0%	3%	1%	0%	1%
Financial Activities	2%	2%	3%	3%	1%	2%
Professional and Business Services	7%	1%	2%	4%	1%	4%
Educational, Health and Social Services	8%	7%	11%	10%	22%	10%
Leisure and Hospitality	8%	14%	6%	11%	22%	9%
Other Services	2%	1%	2%	2%	2%	2%
Government	24%	55%	41%	21%	29%	29%
Source: Utah Department of Workforce Services.						
*Employment industries separate out government employment; claimant industries include government.						

In the Central ESA as a whole, other major contributors of total employment include retail trade (14 percent), private education/health/social services (10 percent) and leisure/hospitality services (9 percent). Specific counties show additional sources of industrial employment strength. In Millard County, covered agriculture (11 percent) and utilities (11 percent) also play a major employment role. For a rural county, Sanpete County maintains a relatively high share of manufacturing employment (9 percent). In Sevier County, the transportation/warehousing (11 percent) industry ranks as a major employment player.

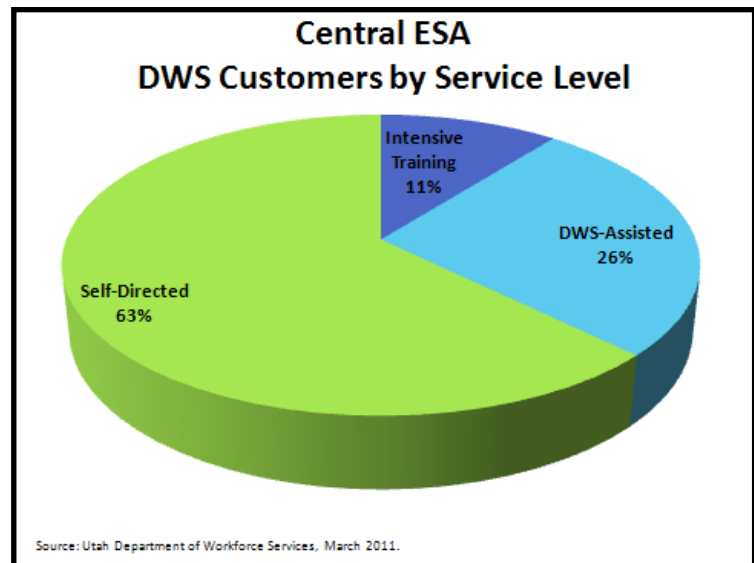
FIRM SIZE

While no standard definition exists for what constitutes a large firm or small firm, small firms definitely dominate the employer landscape in the Central ESA. For example, roughly 70 percent of firms in the area had fewer than 10 employees in the first quarter of 2010. This concentration of small firms is common even in more densely populated urban areas. On the other hand, *employment* is concentrated in firms with between 20 and 99 employees. These employers account for about 45 percent of total employment. The next tier of employers (100 to 249 employees) comprises another 11 percent of employment. Very large employers (at least for this area) with more than 250 workers generate only 8 percent of employment.

B. DEMOGRAPHICS OF LABOR FORCE AND CUSTOMER GROUPS

This report will examine several demographic groups:

- **Labor Force**—individuals living in the area which are over the age of 16 and considered employed or unemployed (to be counted as unemployed an individual must be searching for work).
- **Nonfarm Jobs or Nonfarm Employment**—jobs are counted by place of employment rather than by residence. Also, an individual can have more than one job.
- **UI/EB Claimants**—Individuals filing a weekly claim for unemployment insurance for the week including the 12th of the month under the state unemployment program or state extended benefits program (does not include federal or military workers.)
- **DWS Intensive/Training Customers**—those customers of the Department of Workforce Services who are case-managed or are receiving training assistance. These customers comprise only 11 percent of the total customer base in the Central ESA. Roughly 60 percent of these customers are female and 40 percent male.
- **DWS Assisted Customers**—those customers who received a recorded employment-related service from a DWS employee, but were not case-managed or receiving training assistance (26 percent of customers in the ESA). Roughly 60 percent of these customers are male compared to about 40 percent female.
- **DWS Self-Directed Customers**—those customers using our online employment services only. This group comprises the largest portion of DWS customers in the Central ESA—63 percent. Self-directed customers are slightly more likely to be male (54 percent) than female (46 percent).



COMMUTER PATTERNS

Most workers in the Central ESA do not commute outside their home county for work. Data from the American Community Survey indicates that about 88 percent of workers in the area stay in their county for employment purposes. However, in Piute County, commuting to work is relatively common. Approximately 36 percent of Piute County workers leave the county for their job. Sanpete County also shows a high rate of out-of-county commuting. More than 14 percent of residents work in other Utah counties and another 2 percent work outside the state. Workers in Millard and Wayne counties are most likely to work in their home counties—about 92 percent of workers in both counties stay in their counties of residence.

Labor Force Commuting Patterns 2005-2009 Central ESA

	Worked in County of Residence	Worked Outside Resident County in Utah	Worked Outside of Utah
Central ESA	87.7%	10.9%	1.4%
Millard	91.8%	7.2%	1.0%
Piute	64.1%	33.0%	2.8%
Sanpete	83.8%	14.1%	2.0%
Sevier	90.6%	8.5%	0.9%
Wayne	91.7%	7.6%	0.7%

Source: U.S. Census Bureau; American Community Survey.

COUNTY PATTERNS

Together, Sanpete and Sevier counties comprise almost three-fourths of the Central ESA's labor market. Sevier County accounts for a greater share of jobs while Sanpete County shows the highest share of the labor force (reflecting its high out-commuting rate). These patterns play themselves out fairly evenly in

Labor Force, Jobs and Customers by County Central ESA

	Share of ESA Total			
	2010 Nonfarm Jobs	2005-2009 Labor Force	March 2011 UI/EB Claimants	March 2011 DWS Customers
Millard	20%	20%	12%	13%
Piute	1%	2%	2%	2%
Sanpete	34%	41%	40%	38%
Sevier	39%	32%	37%	45%
Wayne	5%	4%	9%	3%














































Source: U.S. Census Bureau and Utah Department of Workforce Services.

their shares of claimants and DWS customers. Interestingly, while Sevier County's share of the labor force is only 32 percent, its share of DWS customers measures significantly higher—45 percent. On the other hand, Millard County accounts for one-fifth of both jobs and labor force but only 12 percent of the ESA's claimants and 13 percent of its DWS customers. Wayne County happens to account for a higher share of claimants than it does labor force, which probably reflects its heavy dependence on seasonal leisure/hospitality jobs.

AGE

Workers between the ages of 45 and 54 comprise the largest share of the Central ESA's labor force (23 percent). This fact echoes the older population base that is typical in nonurban counties. On the other hand, this age group accounts for only 7 percent of intensive/training customers, 15 percent of assisted customers and 16 percent of self-directed customers. Yet, they account for 21 percent of unemployment insurance claimants.

On the other hand, younger workers between the ages of 19 and 34 are more likely to be DWS customers and unemployment insurance claimants than their share of the labor force and jobs would suggest. Individuals between the ages of 25 and 34 are most likely to use DWS services. They make up about 30 percent of customers while representing only 17 percent of the labor force.

Age of Demographic/Customer Groups						
Central ESA						
	2005-2009 Labor Force*	2009 Employment	March 2011 UI/EB Claimants	March 2011 DWS Customers		
				Intensive/ Training	Assisted	Self Directed
18 and under	 12%	 6%	0%	 8%	 2%	 4%
19-21	 5%	 5%	 5%	 17%	 10%	 12%
22-24	 8%	 6%	 8%	 15%	 10%	 11%
25-34	 17%	 22%	 27%	 30%	 33%	 28%
35-44	 19%	 19%	 23%	 21%	 23%	 19%
45-54	 23%	 21%	 21%	 7%	 15%	 16%
55-64	 14%	 15%	 13%	 2%	 6%	 8%
65 and Older	 4%	 5%	2%	0%	 1%	 1%
Source: U.S. Census Bureau and Utah Department of Workforce Services.						
*Labor force age grouping is "19 and under" and "20-21 years."						

Both very old and very young workers are less likely to be DWS customers than their share of the total labor force would indicate. For example, workers 65 and older comprise 4 percent of the labor force but make up only 1 percent of both assisted and self-directed customers—and essentially 0 percent of intensive/training customers. In general, after the age of 44, individuals in the Central ESA are far less likely to be DWS customers of any type.

EDUCATION

The largest segment of individuals living in the Central ESA have some post-secondary training (but less than a bachelor's degree). Half of younger individuals (18-24) have had some post-secondary or college training, but have not obtained a bachelor's degree. For the population 25 years and older, the share of those with some post-secondary training is lower (37 percent), but almost one-fifth have at least a bachelor's degree. The Central ESA does seem to show an unusually high share of individuals without a high school diploma. The higher 18-24 year-old rate may be partially attributed to the fact that many 18 year-olds are still in school. However, among those 25 and older, 13 percent have not graduated from high school or obtained a GED.

Education of Demographic/Customer Groups Central ESA						
	2005-2009 Population 18-24	2005-2009 Population 25 & Older	March 2011 UI/EB Claimants	March 2011 DWS Customers		
				Intensive/ Training	Assisted	Self Directed
Less Than High School	19%	13%	14%	20%	6%	6%
High School	30%	33%	35%	53%	61%	59%
Post-Secondary, Some College	50%	37%	17%	22%	27%	27%
Bachelor's or Higher	1%	18%	6%	1%	3%	5%
Not Reported/Unkown	0%	0%	29%	5%	3%	3%

Source: U.S. Census Bureau and Utah Department of Workforce Services.

Not surprisingly, DWS customers tend to have less education than the general labor force. Typically, the higher the education, the lower the unemployment rate. So, those relying on DWS services would likely have less education. DWS customers are most likely to have a high school education, although the share of customers with some college remains substantial—between 22 and 27 percent. Fully one-fifth of intensive/training customers do not have a high school education.

Notably lacking among DWS customers are individuals with bachelor's degrees. While approximately 18 percent of the population reports having at least a bachelor's degree or higher, 1 percent of intensive/training customers, 3 percent of assisted customers, and 5 percent of self-directed customers report the same.

A high portion (almost 30 percent) of unemployment insurance claimants did not report educational attainment. This makes comparisons to other demographic groups problematic. However, the same patterns seem to emerge as for other DWS customers.

OCCUPATIONS

While the Census Bureau indicates that only 9 percent of the Central ESA's labor force is employed in a managerial position, DWS customers are much more likely to present themselves as looking for

management-level jobs. In fact, almost 20 percent of assisted customers categorize themselves in a management occupation. This situation most likely occurs *not* because DWS customers dominate as management material, but because they don't understand the occupational coding structure. The Standard Occupational Coding system places first-line supervisors and managers in the occupation they supervise rather than in the "management" occupational group.

Occupations of Demographic/Customer Groups					
Central ESA					
	2005-2009	March 2011	March 2011 DWS Customers		
	Employment	UI/EB Claimants	Intensive/ Training	Assisted	Self Directed
Management	9%	5%	14%	19%	17%
Business/Financial	2%	1%	2%	3%	4%
Computer/Mathematical	1%	1%	0%	2%	2%
Architecture/Engineering	1%	1%	3%	3%	2%
Life/Physical/Social Science	1%	2%	3%	3%	2%
Community/Social Services	1%	1%	4%	4%	3%
Legal	0%	0%	1%	1%	1%
Education/Library	7%	1%	5%	3%	4%
Arts/Design/Entertainment/Sports	1%	1%	2%	2%	3%
Healthcare Practitioners/Technical	4%	1%	9%	2%	4%
Healthcare Support	2%	1%	11%	4%	4%
Protective Service	3%	2%	3%	5%	3%
Food Preparation/Serving	5%	5%	17%	14%	11%
Building/Grounds Cleaning	5%	5%	7%	6%	6%
Personal Care/Service	3%	1%	2%	1%	1%
Sales	10%	6%	7%	5%	6%
Office/Administrative Support	12%	13%	3%	5%	7%
Farming/Fishing/Forestry	4%	3%	1%	3%	4%
Construction/Extraction	8%	24%	3%	9%	11%
Installation/Maintenance/Repair	5%	4%	1%	3%	2%
Production	6%	8%	1%	1%	1%
Transportation /Material Moving	8%	13%	0%	3%	2%

Source: U.S. Census Bureau and Utah Department of Workforce Services.

However, it is curious to note that apparently unemployment insurance claimants understand the distinction between managers and supervisors. The portion of claimants reporting management occupations is actually smaller than share of the total labor force in management occupations. In general, the claimant occupational array more closely mimics the labor force pattern than do other DWS customer groups. The most obvious dissimilarity occurs for construction/extraction workers which are much more prevalent in the claimant group than the broader labor market. This difference is partially due, of course, to the recent recession. However, the seasonal, on-again/off-again nature of construction work also contributes to this higher-than-average occupational share among claimants. In

addition, professional occupations which typically require at least a bachelor's degree (especially in education) are underrepresented among claimants.

DWS customers show an uncommon occupational mix in addition to the high concentration of reported management occupations. This group also displays a relatively high share of food preparation/serving occupations (perhaps because of their perceived skill levels). In addition, customers receiving intensive/training services are more likely to report an occupation in healthcare. In the labor market, only 2 percent of workers specify healthcare support occupations compared to 11 percent for intensive/training customers. The higher concentration in healthcare support occupations may be directly related to those receiving training. Many DWS customers train for healthcare occupations.

RACE AND ETHNICITY

Nationally, 36 percent of the population belongs to an ethnic or racial minority. In the Central ESA, only 11 percent of the area's residents are members of an ethnic/racial minority. Moreover, some of the Central ESA's counties are even less diverse—in Piute, Sevier, and Wayne counties over 91 percent of the population can be categorized as “white, not Hispanic.” Millard County, with its large Hispanic/Latino community, shows the most racial/ethnic diversity although Sanpete County is close behind.

Minority Population Central ESA

	Percent White not Hispanic	Percent Minority	
		Not Hispanic	Hispanic
Central ESA	88.7%	3.1%	8.2%
Millard	84.7%	2.5%	12.8%
Piute	91.2%	1.8%	7.0%
Sanpete	86.7%	3.9%	9.4%
Sevier	92.9%	2.6%	4.5%
Wayne	93.4%	2.4%	4.2%

Source: U.S. Census Bureau; 2010 Census.

The Hispanic/Latino ethnic group registers as the ESA's largest minority. Roughly 8 percent of the area's population can be counted in the Hispanic category compared to 3 percent for all other racial minorities combined. Sanpete displays the largest share of non-Hispanic, non-white population (although still only 4 percent)

POVERTY RATES

The past recession has obviously precipitated an increase in poverty rates across the nation. The U.S. poverty rate for all individuals (2005-2009) registered 13.5 percent. Only one county in the Central ESA exhibited a higher poverty rate than the United States—Sanpete County with an unusually high 18-percent rate of poverty. The student population in Sanpete County may be partially to blame for its high

poverty rate. Students are young and, from an income point-of-view, “poor.” Nevertheless, they often share accommodations and receive monetary assistance from parents, etc. In other words, “poor” students contribute to the county’s high poverty rates. On the other hand, Sanpete does show one of the lowest average wages in the state. Also, keep in mind that poverty rates do not address cost of living. The poverty income levels are identical nationwide. In reality, if cost of living were included in rate calculations, poverty rates in less urbanized area would tend to be lower than in larger cities.

Piute, Sevier, and Wayne counties currently show comparatively low poverty rates—between 10 and 11 percent. Millard County’s rate registers almost on par with the national average—13 percent.

What one demographic factor is most likely to increase your probability of being poor in America? Being a child in a female-headed household. Of course, many individuals receiving DWS case-management/training can be grouped in this category. In addition, children in general are more likely to be “poor.” In most Central ESA counties, poverty rates for children under 18 are higher than for the general population. However, both Sanpete and Wayne counties show child poverty rates lower than that for the general population. Sanpete and Millard counties display the highest poverty rates for children.

On the other hand, seniors—those 65 years and older—generally show lower poverty rates the total population. In Piute County, the 65-plus age group exhibits a poverty rate of only 7 percent. Again, Sanpete and Millard counties show the highest senior poverty figures.

Poverty Rates 2005-2009			
Central ESA			
	Poverty Rates		
	All Individuals	Children Under 18	65 and Over
Millard	13.1%	17.0%	8.7%
Piute	10.5%	14.1%	7.0%
Sanpete	17.5%	16.5%	10.3%
Sevier	9.8%	10.9%	7.5%
Wayne	10.0%	9.5%	7.9%
Source: U.S. Census Bureau; American Community Survey.			

C. FUTURE ECONOMIC ACTIVITY

As mentioned previously, an improving economy should mend some of the current labor market difficulties in the coming year for most counties. Quantified projections for the long term also provide an insight into the areas future economic reality.

Unfortunately, industry and occupational projections produced by DWS do not follow ESA boundaries.

This scenario results from the survey sampling procedures outlined by the Bureau of Labor Statistics—the overseer of the Occupational Employment Statistics program. Because the staffing patterns resulting from the survey do not statistically support ESA-level projections, the figures presented here will be for “Nonmetro” Utah. Also, keep in mind that in this case publicly “owned” education, hospitals, and the postal service jobs are included in their respective industry classifications rather than in government (the typical presentation).

INDUSTRY PROJECTIONS

The need to educate our children and workforce coupled with increasing demand for medical services result in the expectation that the education/health/social services industry will be the largest producer of new jobs during the upcoming decade in NonMetro Utah. In fact, the education/healthcare/social services industry is projected to create 30 percent of the new jobs in this area between 2008 and 2018. In addition, this occupational category should also show the fastest annual growth rate of any major industry.

Industries which already sustain a large portion of current employment tend to also be those which create a large number of new openings. In the Nonmetro area, self-employment, leisure/hospitality services, retail trade and noneducational government are also expected to generate large numbers of new positions.

Industry Projections

Central ESA

	NonMetro Industry Projections	
	New Jobs 2008-2018	Annual Growth Rate
Covered Agriculture/Forestry/Fishing	-730	-0.8%
Mining	1,050	1.2%
Construction	910	1.2%
Manufacturing	620	1.3%
Wholesale Trade	440	1.7%
Retail Trade	2,630	2.1%
Transportation and Warehousing	540	1.1%
Utilities	230	1.5%
Information	180	1.5%
Financial Activities	640	2.0%
Professional and Business Services	1,720	3.4%
Educational, Health and Social Services*	7,340	3.7%
Leisure and Hospitality	2,900	2.3%
Other Services	590	2.0%
Government*	2,330	2.1%
Self-Employed, Unpaid Family Workers	3,050	2.0%
Educational/Health/Social Services industry and excluded from government. U.S. Postal Service employment is included in transportation warehousing. Source: Utah Department of Workforce Services		

OCCUPATIONAL PROJECTIONS













































Projected occupational openings reflect positions created both because of business expansion and positions which become available in order to replace a worker who has left the occupation. Groups of occupations with a large share of employment also tend to generate the most openings. This relationship certainly holds true for the 2008-2018 occupational projections for the NonMetro.

The four major occupational groups expected to produce the most new openings in the area are:

- Office/administrative support
- Sales
- Food/preparation and serving
- Construction/extraction

In addition, projections indicate that transportation/material moving occupations and education/library professions will generate notable numbers of new jobs.

Healthcare support is expected to produce the fastest growth rate among major occupational groups in the NonMetro region. These healthcare “support” occupations require fewer skills and/or training than do the jobs found in the healthcare practitioner/technical group. This strong expansion reveals the underlying need to serve an aging population. Other NonMetro occupational groups with fast expansion rates incorporate community/social services, healthcare practitioners/technical, personal care/service, and business/financial occupations. Remember that a small occupational group may have a high growth rate but produce few actual openings.

Occupational Projections 2008-2018			
Central ESA			
	NonMetro Utah		
	Share of Projected Openings	Growth Rates	
Management	 5%	 1.2%	
Business/Financial	 2%	 2.8%	
Computer/Mathematical	 0%	 2.4%	
Architecture/Engineering	 1%	 2.7%	
Life/Physical/Social Science	 2%	 1.7%	
Community/Social Services	 2%	 3.4%	
Legal	 0%	 1.8%	
Education/Library	 7%	 3.2%	
Arts/Design/Entertainment/Sports	 1%	 2.3%	
Healthcare Practitioners/Technical	 4%	 3.7%	
Healthcare Support	 3%	 5.3%	
Protective Service	 2%	 2.3%	
Food Preparation/Serving	 11%	 2.5%	
Building/Grounds Cleaning	 4%	 1.8%	
Personal Care/Service	 4%	 3.1%	
Sales	 12%	 1.8%	
Office/Administrative Support	 12%	 1.9%	
Farming/Fishing/Forestry	 2%	 -0.5%	
Construction/Extraction	 9%	 1.5%	
Installation/Maintenance/Repair	 5%	 2.0%	
Production	 4%	 1.6%	
Transportation /Material Moving	 7%	 1.4%	
Source: Utah Department of Workforce Services.			

The Utah Department of Workforce Services produces projections for almost 800 individual occupations. Again, large occupations tend to produce the most openings.

Occupations in the NonMetro area with the largest number of projected openings:

- Cashiers
- Waiters and Waitresses
- Retail Salespersons
- Truck Drivers, Heavy and Tractor-Trailer
- Combined Food Preparation and Serving Workers, Including Fast Food
- Secretaries, Except Legal, Medical, and Executive
- Elementary School Teachers, Except Special Education
- First-Line Supervisors/Managers of Retail Sales Workers
- Office Clerks, General
- Maids and Housekeeping Cleaners

Obviously, many of the occupations with the largest number of openings require little training and are not necessarily suitable for providing self-sustaining wages. Star ratings based on employment demand and wages and suggested occupational training lists are available for individual occupations on the labor market information section of the DWS website.

SKILL-BASED PROJECTIONS

By combining occupational projections and skills/knowledge areas from the O*Net database, it is possible to determine which skills will be in high demand in the future. It may be tempting to focus only on technical skills or healthcare skills or computer skills when training the labor force. However, skill-based projections show that *basic* skills provide the underlying foundation from which these other technical skills can be learned.

As the accompanying table shows, basic skills such as “reading, writing and arithmetic” rise to the top of the list for in-demand skills and knowledge areas. Being accomplished in learning new skills, critical thinking, and time management will also be important for jobs today and in the future. Interestingly, projections indicate that an acquaintance with customer service techniques is the most important knowledge area. Clerical knowledge and education/training are also important in the NonMetro area. And, yes, knowledge in the technical areas of mathematics and computers also ranks as a top knowledge area.

Skill and Knowledge Projections

Central ESA

NonMetro Area

Top in-Demand Knowledge Areas

	Projected 2008-2018 Annual Employment		Projected 2008-2018 Annual Employment*
Customer and Personal Service	1,679	Customer and Personal Service	2,250
English Language	690	English Language	975
Clerical	537	Clerical	761
Education and Training	452	Education and Training	715
Psychology	380	Mechanical	664
Mathematics	379	Mathematics	594
Sales and Marketing	341	Psychology	565
Computers and Electronics	310	Administration and Management	490
Administration and Management	295	Computers and Electronics	461
Building and Construction	272	Building and Construction	417

*Employment in occupations in which the listed skill or knowledge area is at least moderately important to job performance, and the occupation requires at least a moderate level of skill-related competence.

Source: Utah Department of Workforce Services.

EVENTS EXPECTED TO CREATE NEW EMPLOYMENT

A listing of business expansions/construction expected to create new employment in the Central ESA can be found at <http://economyutah.blogspot.com/search/label/Region--Central>

VIII. SOUTHWEST ECONOMIC SERVICE AREA: Beaver, Iron, Garfield, Washington, and Kane Counties

By Lecia Parks Langston, Economist

A. CURRENT ECONOMY

Brief Overview

Most counties in the Southwest ESA experienced an easing of economic pressures and several entered the expansion phase of the business cycle during 2010. Generally, ESA counties were generating job growth (the best local economic indicator) by year end and most county unemployment rates also edged downward through most of 2010 and into 2011. Only Iron County failed to show some level of employment expansion in 2010. Although on annual basis 2010 jobless rates appear higher than in 2009, in most cases, they started at a high level and slowly declined for the rest of the year. ESA-wide the industries showing the most employment growth included professional/business services, government,

Job Growth by Industry Southwest ESA

	December 2009 to December 2010 Change in Nonfarm Jobs					
	Beaver	Garfield	Iron	Kane	Washington	ESA
Total Percent Change	1.0%	8.6%	-2.7%	-4.7%	0.3%	0.4%
Covered Agriculture/Forestry/Fishing	5	14	26	-1	10	54
Mining	-111	0	49	1	-50	-111
Construction	3	48	-166	11	-47	-151
Manufacturing	4	-8	-7	0	-30	-41
Wholesale Trade	9	3	-29	-2	-55	-74
Retail Trade	-3	-16	-109	21	-147	-254
Transportation and Warehousing	1	14	6	-4	-9	8
Utilities	-4	-3	1	1	4	-1
Information	-21	-4	-14	-1	-20	-60
Financial Activities	5	-1	-50	-17	-52	-115
Professional and Business Services	1	0	-19	7	231	220
Educational, Health and Social Services	-2	2	-86	-54	159	19
Leisure and Hospitality	129	107	-21	-132	-7	76
Other Services	0	-1	-20	29	28	36
Government	11	1	22	7	155	196

Source: Utah Department of Workforce Services.

and leisure/hospitality services. The largest employment declines occurred in retail trade, construction, and financial activities.

As the economic recovery and expansion continues, the Southwest ESA should see most facets of its economy improve. The Southwest ESA should see continued and improving job growth in 2011 as well as declining unemployment rates.

BEAVER COUNTY

Construction and completion of the windfarm turbines and the startup and closure of a copper mine dominated Beaver County's employment growth performance during the past two years. These two major events placed Beaver County at the top of the job-creation race at the height of the recession, but left it with a significant loss of jobs in 2010. By year-end, the county had just started to create jobs once more (up 1 percent and roughly 20 jobs from December 2010). Although the loss of mining jobs meant sluggish job growth, a surge in leisure/hospitality employment was a welcome improvement.

Other indicators show Beaver County's unemployment rate declining and business investment improving. In addition, with the exception of a brief spike in early 2011, initial claims for unemployment insurance are down compared to the previous two years. On the other hand, both residential and nonresidential construction permitting have yet to show signs of improvement.

GARFIELD COUNTY

Job growth is back with a vengeance in Garfield County. Compared with December 2009, the last month of 2010 showed the county with a remarkable 8.6-percent, 155-job gain. In fact, Garfield County managed to create new jobs for most of 2010. Not surprisingly, most of the new positions occurred in the county's bread-and-butter industry—leisure/hospitality services. However, construction assisted this expansion by generating a notable number of positions as well.

The seasonal nature of many Garfield County jobs creates a perennially high unemployment rate compared to most other counties in the state. Because so many jobs are seasonal, a large share of the labor force is unemployed during the "off season." This results in a high annual unemployment rate—which seems at odds with the county's rapid job creation. Nevertheless, while remaining relatively high, the jobless rate in Garfield County has consistently declined over the past year and a half.

Construction permitting has yet to show signs of improvement in the county. The current increase in construction employment is related to public projects which do not require permits. Sales have expanded in recent months reflecting the gains in the leisure/hospitality industry.

IRON COUNTY

Iron County has not yet entered the ranks of job-growth counties. At the end of 2010, Iron County had yet to escape from its own jobless recovery. Overall, between December 2009 and December 2010, Iron County lost roughly 430 jobs for a year-to-year decline of 3 percent. Construction continued as the job-loss leader followed by retail trade. However, most industries continued to show notable job losses as of December 2010. Only government (which includes publicly funded education) and mining added a notable number of positions. The recent recession hit Iron County with a double whammy—first construction employment collapsed, manufacturing (which maintains a high share of employment for a rural county) was hit by the national recession.

Despite the fact that Iron County is lagging behind in job creation, other indicators do suggest that its employment situation should improve in the months ahead. Construction permitting is up for the first few months of the year, unemployment is edging down, and initial claims for unemployment insurance are lower than in the previous two years. In addition, some quarters in 2010 actually showed a year-to-year increase in gross taxable sales and new car/truck sales for the county.

KANE COUNTY

Kane County entered the job growth arena early in 2010. However, by year-end the county showed a 5-percent, 130-job loss in nonfarm jobs. The largest industry decline in employment occurred in leisure/hospitality services. Since the county has been in the fore-front of job creation over the past year, the current decline may very well be just a seasonal anomaly rather than true decline in employment. Construction, “other services,” and retail trade all generated notable job gains.

As in other counties in the Southwest ESA, Kane County’s jobless rates have trended downward over the past year. Other positive indicators include a recent surge in nonresidential construction permitting and a strong year for gross taxable sales.

WASHINGTON COUNTY

Washington County generated its first job growth in almost three years in November 2010. While the December 2009 to December 2010 job growth measured only 160 jobs and less than 1 percent, survey data indicates that the growth trend has improved in the early months of 2011. Professional/business services contributed the largest number of net new jobs. This is a common occurrence as an economy pulls itself out of recession. Typically as expansion begins, firms hire “temps” to increase production while at the same time allowing the flexibility not afforded by regular hires. And, temp agencies are driving the employment gains in this industry. Private education/health/social services and government also have added a substantial number of new positions. Perhaps even more importantly, job losses in other industries (particularly construction and manufacturing) have withered dramatically.

Here, too, the jobless rate has trended downward. Plus, residential construction permitting increased notably in 2010 and initial claims for unemployment insurance have declined substantially. In the housing market, sales are improving and home prices should start increasing in 2011. Only gross taxable sales have failed to show a decided improvement.

Unemployment Rates

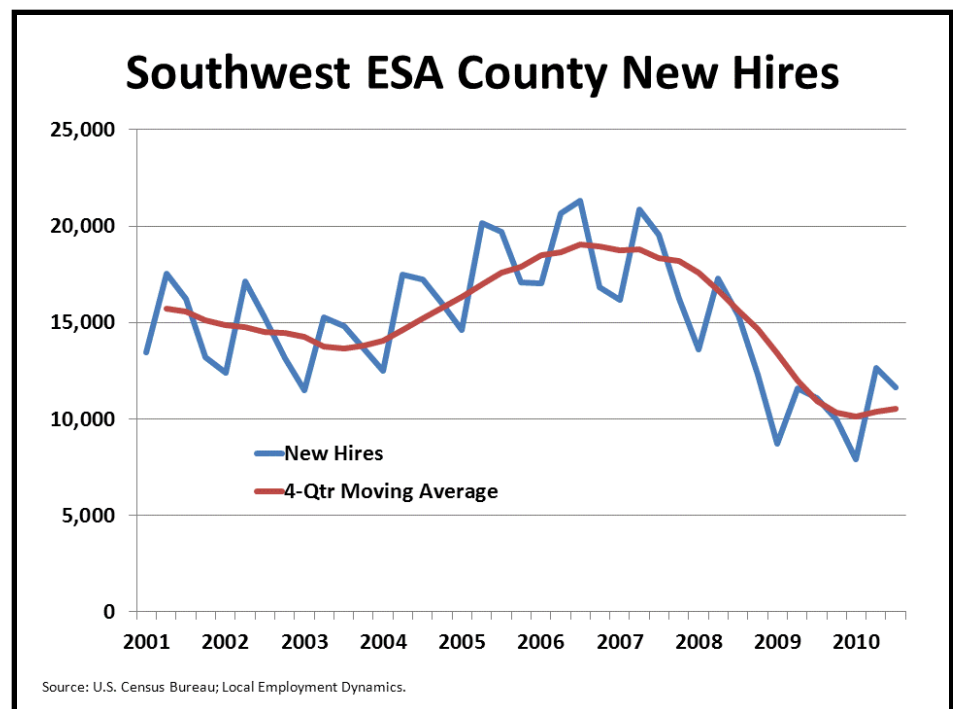
Southwest ESA

	Annual Unemployment Rates		
	2008	2009	2010
Beaver	3.6%	6.0%	8.3%
Garfield	6.3%	10.1%	10.3%
Iron	4.6%	8.5%	9.6%
Kane	4.3%	7.4%	8.2%
Washington	4.9%	9.5%	10.1%

Source: Utah Department of Workforce Services.

RECENT HIRING ACTIVITY

In the worst hiring quarter of the recession/recovery—first quarter 2010—roughly 7,900 workers were hired at a new job in the Southwest ESA. On average during the past two years, almost 11,000 hires were recorded in the ESA. The four-quarter moving average which shows trends rather than seasonal fluctuations indicates that hiring is once again improving in the Southwest ESA.



The highest level of recent hiring activity in the Southwest ESA has occurred in the **leisure/hospitality** industry. This makes sense because the leisure/hospitality industry participates in a sizable amount of seasonal hiring. **Professional/business services** (which include “temp” agencies)—particularly in Washington and Iron counties—also provided a large number of new hires. While these temporary jobs may seem less desirable than permanent jobs, they often lead to more stable employment.

Private education/health/social services added a substantial number of new hires. **Retail trade** and, yes, **construction** also generated notable numbers of new employment. Keep in mind that these industries have high turnover rates and that a new hire simply represents a person who is currently on the employer’s payroll, but wasn’t on that payroll during the previous quarter.

In two industries, new hires were extremely limited. Utilities and mining produced few new hires in the most recent quarter for which data is available. However, third quarter showed increased hiring in most industries.

New Hires by Industry*						
Southwest ESA						
	Third Quarter 2010 New Hires					
	Beaver	Garfield	Iron	Kane	Washington	ESA
Covered Agriculture/Forestry/Fishing	31	N/A	59	0	35	127
Mining	0	0	11	3	40	54
Construction	23	17	223	33	870	1,167
Manufacturing	9	5	101	7	289	410
Wholesale Trade	N/A	7	40	5	81	134
Retail Trade	51	37	340	76	1,322	1,826
Transportation and Warehousing	13	N/A	35	7	386	443
Utilities	0	N/A	N/A	0	4	7
Information	0	5	15	3	75	97
Financial Activities	N/A	N/A	86	15	276	381
Professional and Business Services	3	N/A	496	17	1,240	1,908
Educational, Health and Social Services	29	57	448	42	1,328	1,903
Leisure and Hospitality	62	281	536	295	1,518	2,693
Other Services	4	5	54	69	251	383
Public Administration*	18	8	79	28	139	273
Source: U.S. Census Bureau; Local Employment Dynamics.						
*Unlike typical industry data, these industry groups include government employment--except federal.						
New hires represent individuals on an employer's payroll who weren't on the payroll in the previous quarter.						

CURRENT INDUSTRIAL BASE

In the Southwest ESA, government (which includes public education and higher education) accounts for, by far, the most employment of any industrial sector. Area wide, it includes one-fifth of total employment. Washington County and Garfield counties find their main source of jobs elsewhere. In Washington County, even with Dixie State College and Zion National Park, the public sector accounts for 15 percent of total jobs—less than private education/health/social services. In Garfield County, the most tourism-dependent county in the state, the leisure/hospitality takes top employment marks.

For the ESA as a whole, retail trade, private education/health/social services, and the leisure/hospitality industries run neck and neck for the next-largest contributions to total employment. In Garfield and Kane counties, leisure and hospitality services account for a much larger piece of the employment pie. In addition, a large portion of Beaver County's employment can be categorized in covered agriculture (jobs covered by unemployment insurance laws). In Kane County, "other services" (which includes the Best Friends Animal Sanctuary) adds a significant share of total jobs.

Industries accounting for small employment shares include mining, utilities, information, wholesale trade and other services. Each of these industries contributes 3 percent or less of total employment in the ESA.

Industry Employment Southwest ESA							
	Share of Total 2010 Nonfarm Employment						ESA
	Beaver	Garfield	Iron	Kane	Washington		
Covered Agriculture/Forestry/Fishing	25%	0%	2%	0%	0%		1%
Mining	2%	5%	0%	0%	0%		1%
Construction	5%	0%	5%	3%	7%		6%
Manufacturing	3%	3%	9%	3%	5%		6%
Wholesale Trade	1%	2%	2%	1%	2%		2%
Retail Trade	16%	6%	14%	11%	16%		15%
Transportation and Warehousing	9%	1%	2%	1%	6%		5%
Utilities	2%	1%	1%	1%	0%		0%
Information	0%	5%	1%	1%	2%		1%
Financial Activities	3%	1%	5%	4%	4%		4%
Professional and Business Services	1%	1%	8%	2%	8%		7%
Educational, Health and Social Services	3%	11%	11%	5%	18%		15%
Leisure and Hospitality	16%	40%	12%	29%	15%		16%
Other Services	2%	1%	2%	15%	3%		3%
Government	37%	26%	29%	24%	15%		20%

Source: Utah Department of Workforce Services.
 *Employment industries separate out government employment; claimant industries include government.

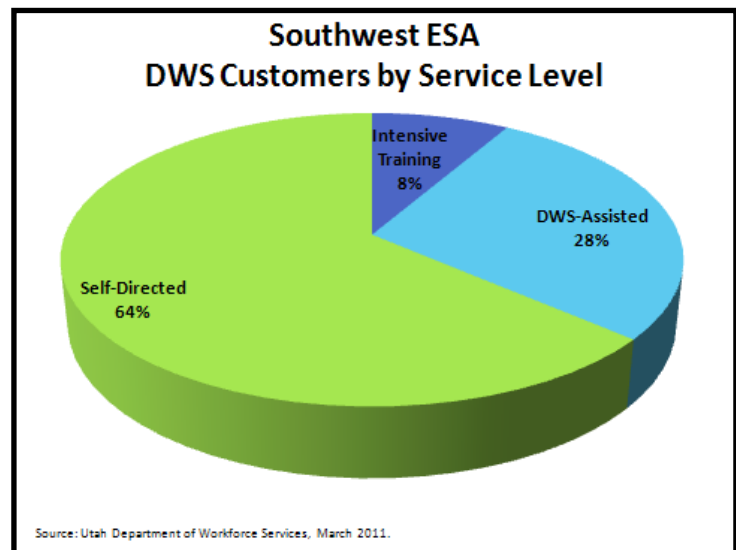
FIRM SIZE

While no standard definition exists for what constitutes a large firm or small firm, firms with few employees definitely dominate the employer landscape in the Southwest ESA. For example, roughly 78 percent of firms in the area had fewer than 10 employees in the first quarter of 2010. This concentration of small firms is common even in more densely populated urban areas. On the other hand, *employment* is concentrated in firms with between 20 and 99 employees. These employers account for about 40 percent of total employment. Large employers—those with 250 or more workers—contribute another 13 percent of the area’s jobs but less than 1 percent of employers. Not surprisingly, these very large employers are concentrated in Iron and Washington counties.

B. DEMOGRAPHICS OF LABOR FORCE AND CUSTOMER GROUPS

This report will examine several demographic groups:

- **Labor Force**—individuals living in the area which are over the age of 16 and considered employed or unemployed (to be counted as unemployed an individual must be searching for work).
- **Nonfarm Jobs or Nonfarm Employment**—jobs are counted by place of employment rather than by residence. Also, an individual can have more than one job.



- **UI/EB Claimants**—Individuals filing a weekly claim for unemployment insurance for the week including the 12th of the month under the state unemployment program or state extended benefits program (does not include federal or military workers.)
- **DWS Intensive/Training Customers**—those customers of the Department of Workforce Services who are case-managed or are receiving training assistance. These customers comprise only 8 percent of the total customer base in the Southwest ESA. Approximately 63 percent of these customers are female compared to 37 percent male.

- **DWS Assisted Customers**—those customers who received a recorded employment-related service from a DWS employee, but were not case-managed or receiving training assistance (28 percent of customers in the ESA). Men (58 percent) are more likely to receive this type of assistance than are women (42 percent).
- **DWS Self-Directed Customers**—those customers using our online employment services only. This group comprises the largest portion of DWS customers in the Southwest ESA—64 percent. This is the most balanced group by gender—54 percent are male; 46 percent are female.

COMMUTER PATTERNS

Most workers in the Southwest ESA do not commute outside their home county for work. Data from the American Community Survey indicates more than 92 percent of workers in the area do not leave the county for employment purposes. Kane and Garfield counties show the highest percentage of commuting employees. Roughly 10 percent of Kane County workers work in other Utah counties and another 11 percent actually work outside the state. In Garfield County, 9 percent of residents work in other Utah counties and another 3 percent work outside the state. Interestingly, despite a notable number of workers commuting to Iron County and Clark County, Nevada, Washington County displays the lowest commuter rate in the ESA.

Labor Force Commuting Patterns 2005-2009 Southwest ESA

	Worked in County of Residence	Worked Outside Resident County in Utah	Worked Outside of Utah
Southwest ESA	92.4%	4.5%	3.1%
Beaver County	92.5%	7.0%	0.5%
Garfield County	87.9%	9.0%	3.1%
Iron County	90.4%	7.5%	2.1%
Kane County	78.9%	10.2%	10.8%
Washington County	94.1%	2.7%	3.1%

Source: U.S. Census Bureau; American Community Survey.

COUNTY PATTERNS

Obviously because of its large population base, Washington County dominates the Southwest ESA regardless of demographic group. In fact, the share of each total ESA demographic group—jobs, labor force, claimants, and customers—remains remarkably stable at 65 to 68 percent. Beaver County's share of each group appears equal—only 3 percent. On the other hand, Garfield County share of unemployment insurance claimants (7 percent) measures more than double its share of the labor force. This situation reflects the seasonal nature of many of the county's tourism-related jobs. Interestingly,

Garfield County contributes only 1 percent of the ESA's DWS customers. Kane County also shows a lower share of customers (2 percent) than its share of the labor force (4 percent).

AGE

Individuals between the ages of 25 and 34 make up the largest segment of each demographic group in the Southwest ESA. They account for roughly one-fourth of people in both jobs and the labor force. However, this age group contributes an even larger share of individuals who have contact with DWS services. Fully one-third of DWS customers receiving intensive and/or training services range between 25 and 34 years of age. This age category comprises approximately 30 percent of other customer groups—claimants, customers receiving in-house assistance and self-directed customers.

Labor Force, Jobs and Customers by County Southwest ESA

	Share of ESA Total			
	2010 Nonfarm Jobs	2005-2009 Labor Force	March 2011 UI/EB Claimants	March 2011 DWS Customers
Beaver	3%	3%	3%	3%
Garfield	3%	3%	7%	1%
Iron	22%	24%	21%	26%
Kane	4%	4%	5%	2%
Washington	67%	66%	65%	68%

Source: U.S. Census Bureau and Utah Department of Workforce Services.

Age of Demographic/Customer Groups

Southwest ESA

	2005-2009 Labor Force*	2009 Employment	March 2011 UI/EB Claimants	March 2011 DWS Customers		
				Intensive/ Training	Assisted	Self Directed
18 and under	8%	5%	0%	4%	2%	3%
19-21	6%	8%	5%	13%	7%	9%
22-24	11%	9%	7%	12%	10%	11%
25-34	23%	25%	28%	33%	29%	30%
35-44	18%	19%	20%	22%	21%	18%
45-54	18%	18%	21%	11%	18%	17%
55-64	13%	12%	15%	4%	11%	10%
65 and Older	4%	4%	3%	0%	2%	2%

Source: U.S. Census Bureau and Utah Department of Workforce Services.

*Labor force age grouping is "19 and under" and "20-21 years."

Both very old and very young workers are less likely to be DWS customers than their share of the total labor force would suggest. For example, workers 65 and older comprise 4 percent of the labor force but make up only 2 percent of both assisted and self-directed customers—and essentially 0 percent of intensive/training customers. In general, after the age of 44, individuals in the Southwest ESA are far less likely to be intensive/training customers although their shares of assisted and self-directed customers are roughly equivalent to their shares of the labor force. Interestingly, age does not seem to be a barrier when it comes to the use of the DWS online job-matching service. By age group, the share of self-directed customers is roughly equivalent to their share of the labor force.

EDUCATION

In the general population, the highest percentage of individuals living in the Southwest ESA have some post-secondary training (but less than a bachelor's degree). Almost half of younger individuals (18-24) have had some post-secondary or college training, but have not obtained a bachelor's degree. For the population 25 years and older, the share of those with some post-secondary training is lower (38 percent), but almost one-fourth have at least a bachelor's degree.

Education of Demographic/Customer Groups

Southwest ESA

	2005-2009 Population 18-24	2005-2009 Population 25 & Older	March 2011 UI/EB Claimants	March 2011 DWS Customers		
				Intensive/ Training	Assisted	Self Directed
Less Than High School	15%	9%	13%	12%	3%	4%
High School	31%	29%	30%	59%	59%	56%
Post-Secondary, Some College	49%	38%	18%	23%	29%	28%
Bachelor's or Higher	5%	23%	10%	2%	7%	9%
Not Reported/Unkown	0%	0%	29%	4%	3%	3%

Source: U.S. Census Bureau and Utah Department of Workforce Services.

Not surprisingly, claimants and DWS customers present a different picture. Here, the largest share of customers report obtaining at least a high school diploma or GED. However, the portion of customers with at least some post-secondary training remains substantial. Almost one-fourth of intensive/training customers have had post-secondary training. Only 12 percent of these intensive customers have less than a high school degree—just slightly higher than the general population. Note that the share of assisted and self-directed customers reporting less than a high school education appears far lower than in the general population.















































































































Individuals with bachelor's degrees or higher are the least likely to be DWS customers of any ilk. For example, 23 percent of those 25 years and older have at least a bachelor's degree compared to 3 percent of intensive/training customers, 7 percent of assisted customers, and 9 percent of self-directed customers. This pattern dovetails nicely with other data that indicates that individuals with college degrees are far less likely to be unemployed.

A high portion (almost 30 percent) of unemployment insurance claimants did not report educational attainment. This makes comparisons to other demographic groups problematic. However, the same patterns seem to emerge for other DWS customers.

OCCUPATIONS

While the Census Bureau indicates that only 9 percent of the Southwest ESA's labor force is employed in a managerial position, DWS customers are more than twice as likely to present themselves as looking for management-level jobs. In fact, almost 30 percent of assisted customers categorize themselves in a management occupation. This situation most likely occurs not because DWS customers dominate as management material, but because they don't understand the occupational coding structure. The Standard Occupational Coding system places first-line supervisors and managers in the occupation they supervise rather than in the "management" category.

Occupations of Demographic/Customer Groups Southwest ESA

	2005-2009 Employment	March 2011 UI/EB Claimants	March 2011 DWS Customers		
			Intensive/ Training	Assisted	Self Directed
Management	 9%	 8%	 18%	 28%	 24%
Business/Financial	 3%	 2%	 3%	 4%	 4%
Computer/Mathematical	 1%	 1%	 2%	 2%	 2%
Architecture/Engineering	 1%	 1%	 2%	 3%	 2%
Life/Physical/Social Science	 1%	 1%	 2%	 1%	 2%
Community/Social Services	 2%	 1%	 3%	 4%	 3%
Legal	 1%	 0%	 0%	 1%	 0%
Education/Library	 6%	 1%	 5%	 3%	 3%
Arts/Design/Entertainment/Sports	 2%	 1%	 3%	 3%	 3%
Healthcare Practitioners/Technical	 4%	 1%	 4%	 2%	 3%
Healthcare Support	 2%	 2%	 11%	 5%	 4%
Protective Service	 1%	 3%	 3%	 3%	 3%
Food Preparation/Serving	 6%	 10%	 19%	 13%	 11%
Building/Grounds Cleaning	 5%	 5%	 7%	 6%	 5%
Personal Care/Service	 4%	 2%	 1%	 1%	 1%
Sales	 13%	 10%	 6%	 5%	 6%
Office/Administrative Support	 14%	 13%	 4%	 5%	 7%
Farming/Fishing/Forestry	 1%	 2%	 1%	 1%	 1%
Construction/Extraction	 9%	 17%	 5%	 6%	 9%
Installation/Maintenance/Repair	 4%	 5%	 1%	 2%	 1%
Production	 5%	 7%	 1%	 1%	 1%
Transportation /Material Moving	 6%	 9%	 1%	 1%	 2%

Source: U.S. Census Bureau and Utah Department of Workforce Services.

However, it is curious to note that apparently unemployment insurance claimants understand the distinction between managers and supervisors. The portion of claimants reporting management occupations roughly equals the share of the total labor force in management occupations. In general, the claimant occupational array more closely mimics the labor force pattern than do other DWS customer groups. The most obvious distinction occurs for construction/extraction workers which are more prevalent in the claimant group than the broader labor market. This difference is partially due, of course, to the recent recession. However, the seasonal, on-again/off-again nature of construction work also contributes to this higher-than-average occupational share among claimants. In addition, professional occupations which typically require at least a bachelor's degree are underrepresented among claimants.

Intensive/training DWS customers show an uncommon occupational mix in addition to the high concentration of reported management occupations. This cluster of customers also displays relatively high shares of food preparation/serving occupations (perhaps because of their perceived skill levels) and healthcare support occupations. In the labor market only 2 percent of workers show healthcare support

occupations compared to 11 percent for intensive/training customers. The higher concentration in healthcare support occupations may be directly related to those receiving training. Many customers train for the lower-skilled healthcare support occupations.

RACE AND ETHNICITY

Nationally, 36 percent of the population belongs to an ethnic or racial minority. In the Southwest ESA only 14 percent of the area's residents are members of an ethnic/racial minority. Moreover, some of the Southwest ESA's counties are even less diverse—in both Garfield and Kane counties over 90 percent of the population can be categorized as “white, not Hispanic.” Washington County shows the most racial diversity, but Beaver County falls close behind.

Minority Population Southwest ESA			
	Percent White not Hispanic	Percent Minority	
		Not Hispanic	Hispanic
Southwest ESA	86.4%	4.6%	9.0%
Beaver County	86.0%	3.2%	10.8%
Garfield County	91.6%	3.8%	4.5%
Iron County	87.1%	5.1%	7.7%
Kane County	93.2%	3.1%	3.7%
Washington County	85.6%	4.6%	9.8%
Source: U.S. Census Bureau; 2010 Census.			

The Hispanic/Latino ethnic group registers as the ESA's largest minority. Roughly 9 percent of the area's population can be counted in the Hispanic category compared to less than 5 percent for all other racial minorities combined. Beaver actually maintains the highest share of Hispanic population—almost 11 percent. On the other hand, Iron County displays the highest portion of “not Hispanic” minorities—more than 5 percent.

POVERTY RATES

The past recession has obviously precipitated an increase in poverty rates across the nation. The U.S. poverty rate for all individuals (2005-2009) registered 13.5 percent. Three counties in the Southwest ESA—Garfield, Kane, and Washington—displayed lower poverty rates ranging between about 10 and 11 percent. Beaver (17 percent) and Iron County's (20 percent) poverty rates appear abnormally high. However, keep in mind that Southern Utah University presents a major presence in Iron County. Student populations are young and, from an income point-of-view, “poor.” Nevertheless, they often share

accommodations and receive monetary assistance from parents, etc. In other words, “poor” students undoubtedly skew Iron County’s poverty rates. Also, keep in mind that poverty rates do not address cost of living. The poverty income levels are identical nationwide. In reality, if cost of living were included in rate calculations, poverty rates in less urbanized area would tend to be lower than in larger cities.

Poverty Rates 2005-2009			
Southwest ESA			
	Poverty Rates		
	All Individuals	Children Under 18	65 and Over
Beaver County	16.8%	26.8%	9.0%
Garfield County	10.8%	12.7%	13.8%
Iron County	19.7%	20.5%	6.0%
Kane County	10.6%	14.7%	3.3%
Washington County	9.8%	12.2%	5.3%
Source: U.S. Census Bureau; American Community Survey.			

Which demographic factor is most likely to increase your probability of being poor in America? Being a child in a female-headed household. Of course, many individuals receiving DWS case-management/training can be grouped in this category. In addition, children in general are more likely to be “poor.” In all counties, poverty rates for children under 18 are higher than for the general population. Again, Beaver and Iron County display the highest poverty rates for children.

On the other hand, seniors—those 65 years and older—generally show lower poverty rates than the total population. In Kane County, the 65-plus age group exhibits a poverty rate of only 3.3 percent. For this senior age group, Garfield County presents the one exception. With a poverty rate of almost 14 percent Garfield County seniors are more likely to be in poverty than are its children.

C. FUTURE ECONOMIC ACTIVITY

As mentioned previously, an improving economy should mend some of the current labor market difficulties in the coming year. Quantified projections for the long term also provide an insight into the areas future economic reality.

Unfortunately, industry and occupational projections produced by DWS do not follow ESA boundaries. This scenario results from the survey sampling procedures outlined by the Bureau of Labor Statistics—the overseer of the Occupational Employment Statistics program. Because the staffing patterns resulting from the survey do not statistically support ESA-level projections, the figures presented here will be for “Nonmetro” Utah—primarily the rural counties—and Washington County. Also, keep in mind that in this

case publicly “owned” education, hospitals, and the postal service are included in their respective industry classifications rather than in government (the typical presentation).

INDUSTRY PROJECTIONS

The need to educate our children and workforce coupled with increasing demand for medical services result in the expectation that the education/health/social services industry will be the largest producer of new jobs in the upcoming decade.

This pattern holds true for both Washington County and NonMetro Utah. In fact, the education/healthcare/social services industry is projected to create at least 30 percent of the new jobs in both these areas between 2008 and 2018. In addition, it should also show the fastest annual growth rate of any major industry in both areas.

Industries which already sustain a large portion of current employment tend to also be those which create a large number of new openings. In the Nonmetro area, self-employment, leisure/hospitality services, retail trade and noneducational government are also expected to generate large numbers of new positions. In Washington County, projections indicate that self-employment, leisure/hospitality services, retail trade, construction (in the long run), and noneducational government should contribute substantial additions to the labor market.

Industry Projections

Southwest ESA

	NonMetro Industry Projections		Washington County Industry Projections	
	New Jobs 2008-2018	Annual Growth Rate	New Jobs 2008-2018	Annual Growth Rate
Covered Agriculture/Forestry/Fishing	-730	-0.8%	-50	-0.9%
Mining	1,050	1.2%	40	1.5%
Construction	910	1.2%	1,750	2.8%
Manufacturing	620	1.3%	570	1.8%
Wholesale Trade	440	1.7%	200	1.7%
Retail Trade	2,630	2.1%	1,930	2.4%
Transportation and Warehousing	540	1.1%	930	3.2%
Utilities	230	1.5%	20	2.0%
Information	180	1.5%	130	2.0%
Financial Activities	640	2.0%	590	2.7%
Professional and Business Services	1,720	3.4%	1,910	4.8%
Educational, Health and Social Services*	7,340	3.7%	6,600	5.9%
Leisure and Hospitality	2,900	2.3%	2,870	4.2%
Other Services	590	2.0%	390	2.7%
Government*	2,330	2.1%	620	2.2%
Self-Employed, Unpaid Family Workers	3,050	2.0%	1,580	2.0%

* Public hospitals and education are included in the Educational/Health/Social Services industry and excluded from government. U.S. Postal Service employment is included in transportation warehousing.
Source: Utah Department of Workforce Services

OCCUPATIONAL PROJECTIONS

Projected occupational openings reflect positions created both because of business expansion and positions which become available in order to replace a worker who has left the occupation. Groups of occupations with a large share of employment also tend to generate the most openings. This relationship certainly holds true for 2008-2018 occupational projections for both the NonMetro area and Washington County.

The four major occupational groups expected to produce the most new openings in both areas are:

- Office/administrative support
- Food/preparation and serving
- Sales
- Construction/extraction

Furthermore, in the NonMetro area, projections indicate that transportation/material moving occupations and education/library professions will generate notable numbers of new jobs. Reflecting its position as a regional healthcare provider, Washington County is also projected to show substantial numbers of professional healthcare practitioners/technical, healthcare support openings and transportation occupations.

Occupational Projections 2008-2018								
Southwest ESA								
	Share of Projected Openings				Growth Rates			
	Washington County		Nonmetro		Washington County	Nonmetro		
Management	<div><div></div></div>	4%	<div><div></div></div>	5%	<div><div></div></div>	2.2%	<div><div></div></div>	1.2%
Business/Financial	<div><div></div></div>	3%	<div><div></div></div>	2%	<div><div></div></div>	4.2%	<div><div></div></div>	2.8%
Computer/Mathematical	<div><div></div></div>	1%	<div><div></div></div>	0%	<div><div></div></div>	4.3%	<div><div></div></div>	2.4%
Architecture/Engineering	<div><div></div></div>	1%	<div><div></div></div>	1%	<div><div></div></div>	3.7%	<div><div></div></div>	2.7%
Life/Physical/Social Science	<div><div></div></div>	1%	<div><div></div></div>	2%	<div><div></div></div>	2.9%	<div><div></div></div>	1.7%
Community/Social Services	<div><div></div></div>	2%	<div><div></div></div>	2%	<div><div></div></div>	5.2%	<div><div></div></div>	3.4%
Legal	<div><div></div></div>	0%	<div><div></div></div>	0%	<div><div></div></div>	2.3%	<div><div></div></div>	1.8%
Education/Library	<div><div></div></div>	5%	<div><div></div></div>	7%	<div><div></div></div>	4.2%	<div><div></div></div>	3.2%
Arts/Design/Entertainment/Sports	<div><div></div></div>	2%	<div><div></div></div>	1%	<div><div></div></div>	2.7%	<div><div></div></div>	2.3%
Healthcare Practitioners/Technical	<div><div></div></div>	6%	<div><div></div></div>	4%	<div><div></div></div>	5.6%	<div><div></div></div>	3.7%
Healthcare Support	<div><div></div></div>	6%	<div><div></div></div>	3%	<div><div></div></div>	7.6%	<div><div></div></div>	5.3%
Protective Service	<div><div></div></div>	2%	<div><div></div></div>	2%	<div><div></div></div>	3.1%	<div><div></div></div>	2.3%
Food Preparation/Serving	<div><div></div></div>	13%	<div><div></div></div>	11%	<div><div></div></div>	4.4%	<div><div></div></div>	2.5%
Building/Grounds Cleaning	<div><div></div></div>	4%	<div><div></div></div>	4%	<div><div></div></div>	3.3%	<div><div></div></div>	1.8%
Personal Care/Service	<div><div></div></div>	3%	<div><div></div></div>	4%	<div><div></div></div>	3.2%	<div><div></div></div>	3.1%
Sales	<div><div></div></div>	12%	<div><div></div></div>	12%	<div><div></div></div>	2.5%	<div><div></div></div>	1.8%
Office/Administrative Support	<div><div></div></div>	14%	<div><div></div></div>	12%	<div><div></div></div>	3.5%	<div><div></div></div>	1.9%
Farming/Fishing/Forestry	<div><div></div></div>	0%	<div><div></div></div>	2%	<div><div></div></div>	-0.5%	<div><div></div></div>	-0.5%
Construction/Extraction	<div><div></div></div>	9%	<div><div></div></div>	9%	<div><div></div></div>	2.5%	<div><div></div></div>	1.5%
Installation/Maintenance/Repair	<div><div></div></div>	3%	<div><div></div></div>	5%	<div><div></div></div>	2.6%	<div><div></div></div>	2.0%
Production	<div><div></div></div>	4%	<div><div></div></div>	4%	<div><div></div></div>	2.1%	<div><div></div></div>	1.6%
Transportation /Material Moving	<div><div></div></div>	6%	<div><div></div></div>	7%	<div><div></div></div>	2.7%	<div><div></div></div>	1.4%
Source: Utah Department of Workforce Services.								

Healthcare support is expected to generate the fastest growth rate among major occupational groups in both areas. These healthcare occupations require fewer skills and/or training than do the jobs found in the healthcare practitioner/technical group. This strong expansion reveals the underlying need to serve an aging population. In Washington County, other groups with faster-than-average growth rates include business/financial, computer/mathematical, community/social services, healthcare practitioners/technical, education/library, and food preparation/serving occupations. NonMetro occupational groups with fast expansion rates encompass community/social services, healthcare

practitioners/technical, personal care/service, and business/financial occupations. Remember that a small occupational group may have a high growth rate but produce few actual openings.

The Utah Department of Workforce Services produces projections for almost 800 individual occupations. Again, large occupations tend to produce the most openings.

Occupations in Washington County with the largest number of projected openings:

- Retail Salespersons
- Waiters and Waitresses
- Fast Food Workers
- Cashiers
- Registered Nurses
- Secretaries, Except Legal, Medical, and Executive
- Office Clerks, General
- Home Health Aides
- Landscaping and Groundskeeping Workers
- General and Operations Managers

Occupations in the NonMetro area with the largest number of projected openings:

- Cashiers
- Waiters and Waitresses
- Retail Salespersons
- Truck Drivers, Heavy and Tractor-Trailer
- Combined Food Preparation and Serving Workers, Including Fast Food
- Secretaries, Except Legal, Medical, and Executive
- Elementary School Teachers, Except Special Education
- First-Line Supervisors/Managers of Retail Sales Workers
- Office Clerks, General
- Maids and Housekeeping Cleaners

Obviously, many of the occupations with the largest number of openings require little training and are not necessarily suitable for providing self-sustaining wages. Star ratings based on employment demand and wages and suggested occupational training lists are available for individual occupations on the labor market information section of the DWS website.

SKILL-BASED PROJECTIONS

By combining occupational projections and skills/knowledge areas from the O*Net database, it is possible to determine which skills will be in high demand in the future. It may be tempting to focus only on technical skills or healthcare skills or computer skills when training the labor force. However, skill-based projections show that basic skills provide the underlying foundation from which these other technical skills can be learned.

Skills and Knowledge Projections Southwest ESA							
Top In-Demand Skills				Top in-Demand Knowledge Areas			
Washington County		NonMetro Utah		Washington County		NonMetro Utah	
	Projected 2008-2018 Annual Employment		Projected 2008-2018 Annual Employment		Projected 2008-2018 Annual Employment		Projected 2008-2018 Annual Employment
Active Listening	1,717	Reading Comprehension	2,596	Customer and Personal Service	1,679	Customer and Personal Service	2,250
Reading Comprehension	1,703	Active Listening	2,495	English Language	690	English Language	975
Critical Thinking	1,431	Critical Thinking	2,297	Clerical	537	Clerical	761
Speaking	1,361	Speaking	1,933	Education and Training	452	Education and Training	715
Coordination	1,269	Coordination	1,930	Psychology	380	Mechanical	664
Instructing	1,207	Active Learning	1,897	Mathematics	379	Mathematics	594
Active Learning	1,183	Instructing	1,863	Sales and Marketing	341	Psychology	565
Writing	1,154	Monitoring	1,778	Computers and Electronics	310	Administration and Management	490
Time Mgmt	1,097	Writing	1,667	Administration and Management	295	Computers and Electronics	461
Monitoring	1,095	Time Management	1,655	Building and Construction	272	Building and Construction	417
*Employment in occupations in which the listed skill or knowledge area is at least moderately important to job performance, and the occupation requires at least a moderate level of skill-related competence.							
Source: Utah Department of Workforce Services 2008-2018 Occupational Employment Projections.							

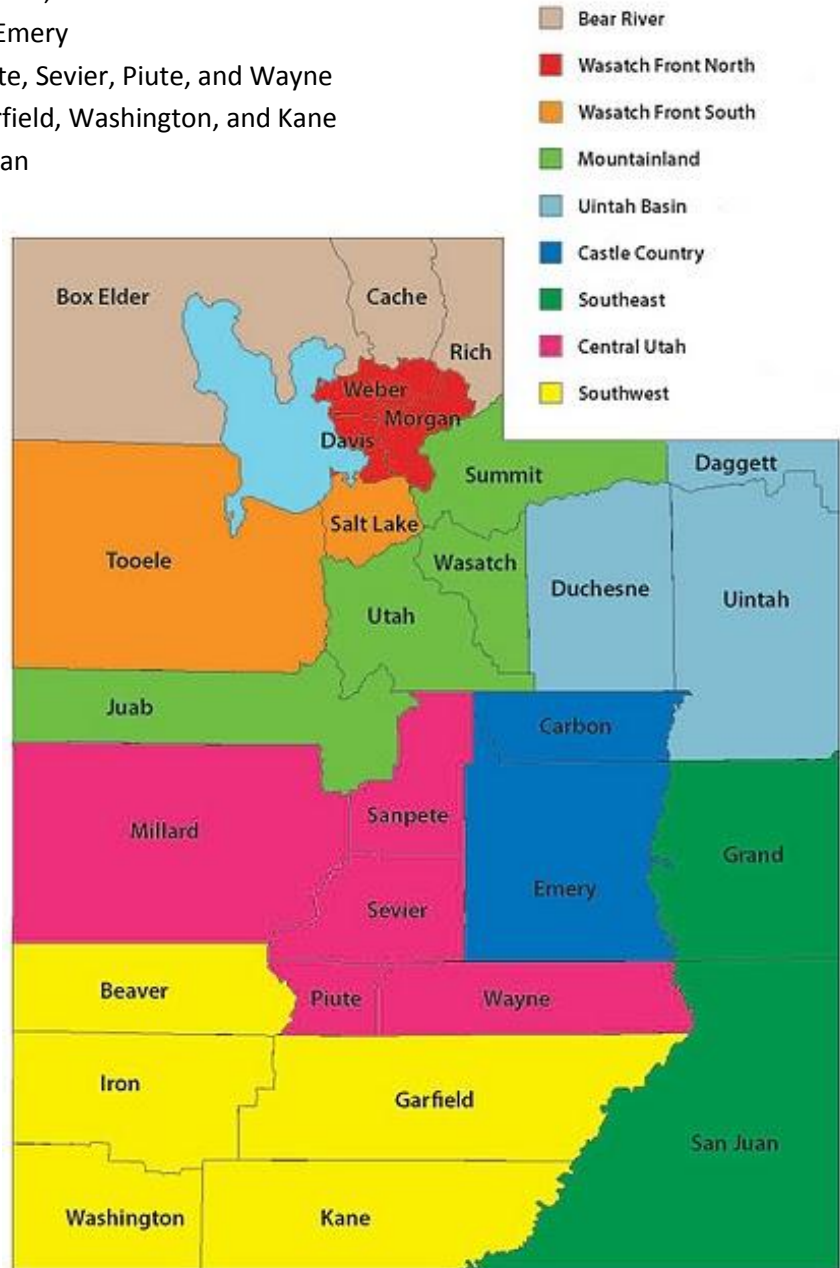
As the accompanying table shows, basic skills such as “reading, writing and arithmetic” rise to the top of the list for in-demand skills and knowledge areas. Being accomplished in learning new skills, critical thinking, and time management will also be important for jobs today and in the future. Interestingly, projections indicate that an acquaintance with customer service techniques is the most important knowledge area. Clerical knowledge and education/training are also important in both Washington County and the NonMetro area. And, yes, knowledge in the technical areas of mathematics and computers also ranks as a top knowledge area.

EVENTS EXPECTED TO CREATE NEW EMPLOYMENT

A listing of business expansions/construction expected to create new employment in the Southwest ESA can be found at <http://economyutah.blogspot.com/search/label/Region--Southwest>

ECONOMIC SERVICE AREA MAP

- Bear River – Box Elder, Cache, and Rich
- Wasatch Front North – Weber, Davis, and Morgan
- Wasatch Front South – Salt Lake and Tooele
- Mountainland – Utah, Summit, Wasatch, and Juab
- Uintah Basin - Daggett, Duchesne, and Uintah
- Castle Country – Carbon and Emery
- Central Utah – Millard, Sanpete, Sevier, Piute, and Wayne
- Southwest – Beaver, Iron, Garfield, Washington, and Kane
- Southeast – Grand and San Juan



UTAH COUNTIES IN REVIEW

To obtain additional copies of this publication, contact:

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